



501 PR345: Strategic Sourcing

Instructor Led Training



Welcome

Welcome to Cardinal Training!

This training provides employees with the skills and information necessary to use Cardinal. It is not intended to replace existing Commonwealth and/or agency policies.

In this course, we will show you the Strategic Sourcing module.

These training materials include diagrams, charts, screenshots, etc., that clarify various Cardinal tasks and processes. The screenshots are taken from Cardinal and show pages that not all users can access. They are included here so you can see how your specific responsibilities relate to the overall transaction or process being discussed. See your agency's security Handbook, located on the Cardinal website, for a list of available roles and descriptions.





Course Objectives

After completing this course, you will be able to:

- Recognize key strategic sourcing concepts
- Create, modify, and manage Strategic Sourcing events in Cardinal
- Enter and analyze bids / proposals
- Award events
- Use key Strategic Sourcing reports
- Understand how strategic sourcing integrates with other Cardinal modules
- Understand how strategic sourcing interfaces with external systems





Course Topics

Today, we will cover the following lessons:

- Lesson 1: Understanding Strategic Sourcing
- Lesson 2: Create Event
- Lesson 3: Maintain Events
- Lesson 4: Create and Modify Bidder Responses
- Lesson 5: Analyze Bids / Proposals and Awarding Events
- Lesson 6: Strategic Sourcing Reports
- Lesson 7: Strategic Sourcing Hands-on Practice



Lesson 1: Understanding Strategic Sourcing

This lesson covers the following topics:

- Procurement Overview
- Strategic Sourcing Key Concepts
- Procurement Process Overview
- Strategic Sourcing Overview



Procurement Overview

The Procurement functional area of Cardinal includes four modules.

Purchasing

The Purchasing module includes the buying of goods and services (Procurement) by creating and processing requisitions, purchase orders (PO), receipts, Procurement Card (PCard), and Integrated Supply Services Program (ISSP) transactions.

eProcurement

Like Purchasing, the eProcurement module provides for Procurement but is web-based. It is similar to an online shopping cart experience for users requesting goods and/or services.

Strategic Sourcing

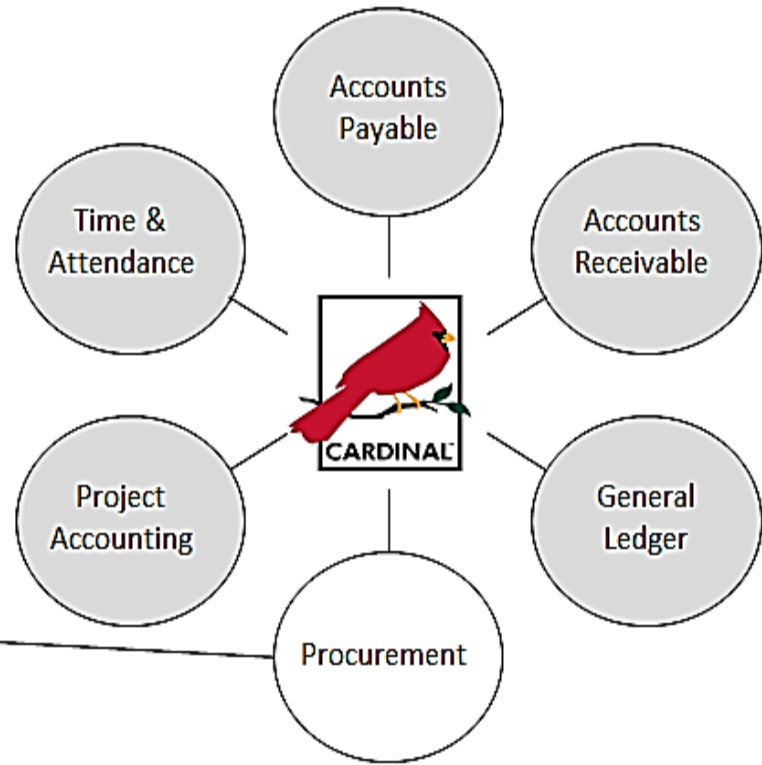
The Strategic Sourcing module allows users to create and award bids / proposals to purchase orders or contracts.

Procurement Contracts

The Procurement Contracts module builds, manages, and archives all Cardinal contract related information.

| Modules | | |
|---------|-----------------------|--|
| | Purchasing | |
| | eProcurement | |
| | Strategic Sourcing | |
| | Procurement Contracts | |

Cardinal Functional Areas





Strategic Sourcing Key Concepts

Key concepts include:

- A Strategic Sourcing event involves the solicitation of quotes, bids / proposals, or offers to establish contracts and/or purchase orders (POs).
- Cardinal provides the Strategic Sourcing (SS) Buyer with a means to create, manage, and award Strategic Sourcing Events.
- The most common event is the Invitation for Bid (IFB) which is primarily awarded to the lowest responsive and responsible bidder meeting the required specifications.
- Similar functionality is provided to create, manage, and award the Two-Step and Request for Proposal (RFP) events. In comparison to the lowest price, these event types are awarded based on the ranking of the Bidder / Offerors' responses and subsequent negotiations, to achieve the best value.
- RFPs are commonly known as competitive negotiations. These events are created with criteria that are weighted (ranked) by level of importance and scored based on the Offerors' submitted proposals. The lowest price is only one of multiple elements used in determining who will receive the award.



- Add/Update Requisitions
- Create Strategic Sourcing Events
- Add/Update Contracts
- Add/Update Purchase Orders
- Add/Update Receipts
- Procurement Card Processing
- Integrated Supply Services Program (ISSP) Processing





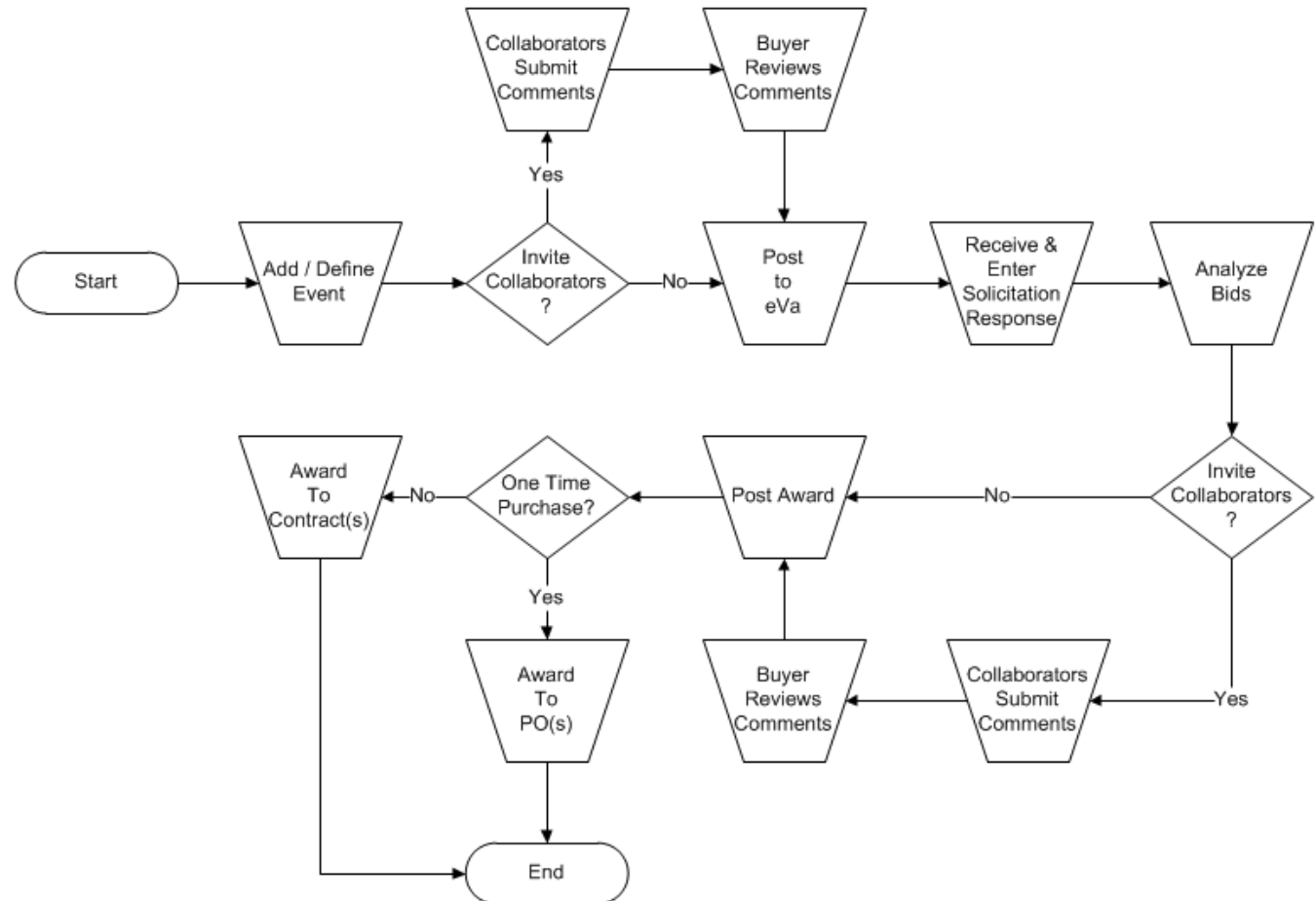


Strategic Sourcing Overview

Strategic Sourcing allows users to create and award bids / proposals to purchase orders or contracts. Sourcing events are manually sent to eVA for posting online in order to obtain bids on items and/or services.

- Strategic Sourcing involves several key steps:

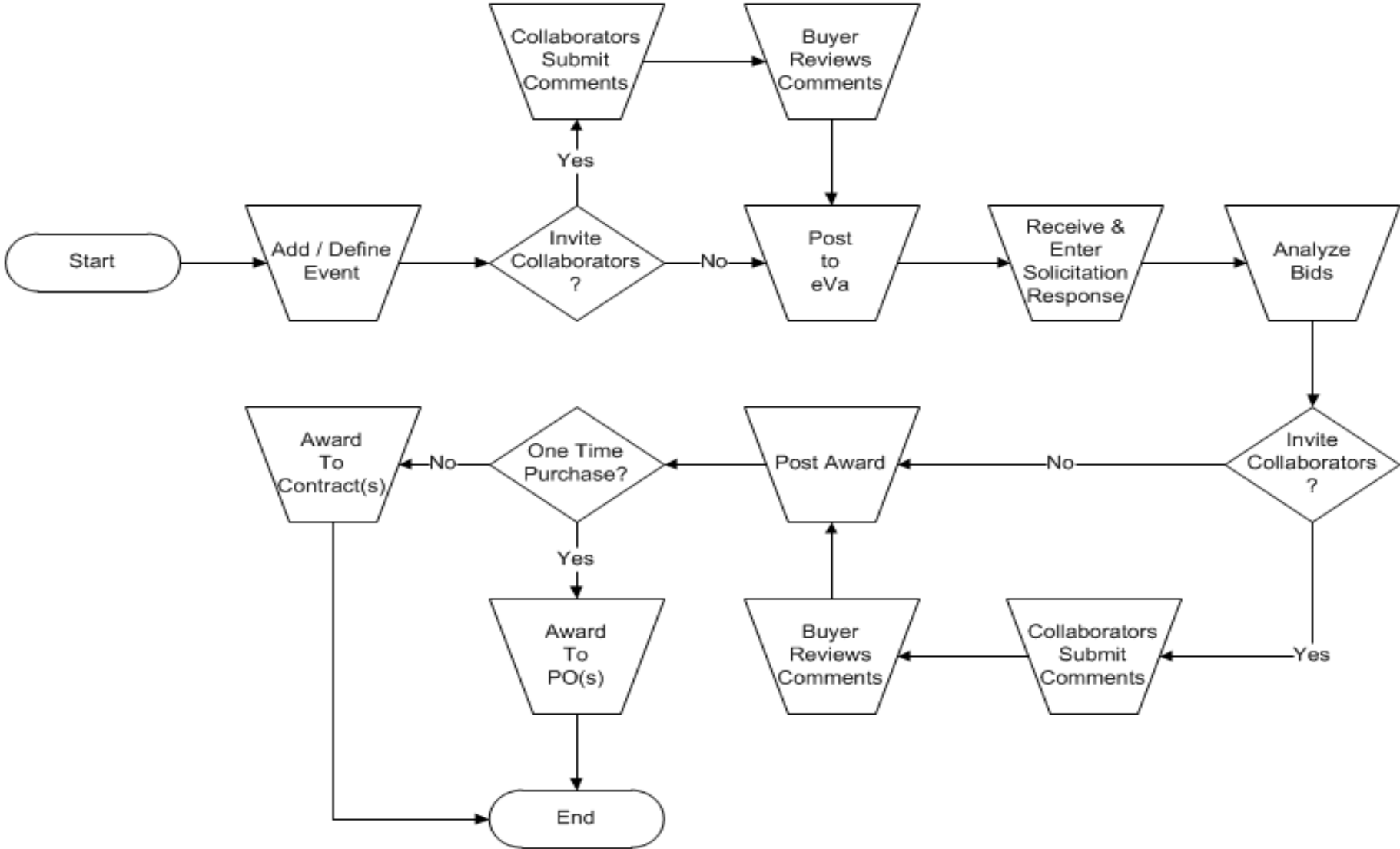
- Add / Define Event
- Event Collaboration*
- Receive and Enter Solicitation Response(s)
- Analyze Bid Response(s)
- Response Collaboration*
- Post Award
- Award to Contract(s) or Purchase Order(s)



*For more details on collaboration, refer to the job aid titled **501 PR345: Strategic Sourcing Collaboration**.



Strategic Sourcing Overview (continued)





Lesson 1: Summary

In this lesson, you learned:

- The procurement functional area is composed of several modules: Purchasing, eProcurement, Strategic Sourcing, Procurement Contracts, and Receipts.
- A strategic sourcing event is the process of soliciting quotes and bids / proposals to establish contracts and/or purchase orders.



Lesson 2: Create Event

This lesson covers the following topics:

- Create Events (Ad Hoc or Copy)
- Define Event Basics (By Line, Group, or Grand Total)
- Configure Line Items
- Select Bidders / Offerors to Invite
- Invite Collaborators
- Post an Event for Bidding



Create Events

To add an event, use the **Create Events** page. Navigate to this page using the following path:

Main Menu > Sourcing > Create Events > Event Details

Select the **Add a New Value** tab. Key fields that need to be defined include:

- **Business Unit:** Confirm your Business Unit
- **Event ID:** Uniquely identifies the event and is automatically assigned (do not modify)
- **Event Format:** Buy
- **Event Type:** RFx

Click **Add** to go to the **Event Summary** page to create your event.

Most events have an **Event Format** of **Buy** and **Event Type** of **RFx** or **RFI**.

CARDINAL

Favorites | Main Menu > Sourcing > Create Events > Event Details

Create Events

Find an Existing Value | Add a New Value

Business Unit: 50100

Event ID: NEXT

Event Round: 1

Event Version: 1

Event Format: Buy

Event Type: RFx

Proxy Bidding (Auctions Only): Disabled

Add

Find an Existing Value | Add a New Value

Buy can be an Invitation For Bid (IFB) or a Request For Proposal (RFP). **RFx** can be an Invitation For Bid (IFB), Request For Proposal (RFP), or Two-Step Bid. **RFI** is a Request for Information.



Create Events (continued)

The **Event Summary** page is updated with the values you previously entered on the **Create Events** page.

When you create an event, you provide an overall description of the event at the header level, with item specific details at the line level. You can copy a previous event, purchase order, requisition, contract, or RFI to create a new event, and save events to use as templates.

On the **Event Summary** page enter the:

- **Solicitation Type**
- **Event Name**
- **Description**
- **Preview Date:** Collaboration end date / time
- **Start Date:** Bids can be entered
- **End Date:** Bids can no longer be entered

CARDINAL

Favorites | Main Menu > Sourcing > Create Events > Event Details

Create an Event

Event Summary

Business Unit: 50100 Event ID: NEXT Round: 1 Version: 1 Event Format: Sell

Event Type: RFx [Change to Auction](#)

Event Status: Open

*Solicitation Type: IFB Sealed Contract

*Event Name:

Description:

Preview Date: 01/16/2013 1:26PM EST

*Start Date: 01/30/2013 1:26PM EST

*End Date: 02/09/2013 1:26PM EST

Copy From:

Preview By: By Line

Required fields reside on pages marked with an asterisk (*) – you may not save your event until all required fields are filled.

Step 1: Define Event Basics
Enter basic information, general settings and optional rules for this event.

[* Event Settings and Options](#) [Payment Terms and Contact Info](#)
[Event Comments and Attachments](#) [Event Constraints](#)
[Event Header Bid Factors](#)

Step 2: Configure Line Items
Create line listings for this event.

[* Line Items](#) [Item Line Defaults](#)

Step 3: Select Bidders to Invite
Send out targeted invitations to this event, designate it as a public event, or both.

The **Preview By** drop-down box allows you to view the event either by line, lot (group), or total.



Create Events (continued)

On the **Event Summary** page, the **Copy From** drop-down allows you to populate fields into the event.

CREATE AN EVENT

Event Summary

Business Unit: 50100 Event ID: 0000153499 Round: 1 Version: 1 Event Format: Buy

Event Type: RFX [Change to Auction](#)

Event Status: Open

*Solicitation Type: Request for Proposal

*Event Name: RFP Sample

Description: RFP Sample Description

*Start Date: 06/22/2016 9:55AM EDT

*End Date: 06/22/2016 11:00AM EDT

*Copy From: [Go](#)

Preview By: ByLine

Required fields reside on pages marked with an asterisk (*) – you may not save your event until all required fields are filled.

Step 1: Define Event Basics
Enter basic information, general settings and optional rules for this event.

[* Event Settings and Options](#)
[Event Comments and Attachments](#)
[Event Header Bid Factors](#)

Step 2: Configure Line Items
Create line listings for this event.

[* Line Items](#)

Step 3: Select Bidders
Send out targeted invitations to this event.

[* Bidder Invitations](#)

Step 4: Invite Collaborators
Invite others to collaborate on this event.

[Event Collaborators](#)

Step 5: Post Event
When all event creation activities are complete, click Post Event to release your event for scheduled external viewing and trigger any bidder invitations you may have defined.

[Save Event](#) [Post](#) [Save As Template](#) [Preview PDF](#)

[Go](#)

Contract
Delimited File
Item Master
Purchase Order
Request For Information
Requisition
Sourcing Event
Sourcing Template

You may click on the **Arrow** icon next to the **Description** field to open a larger **Description** box / field. You can also click on the **Book Check** icon to check your spelling.

Once the header details are entered, click the **Save Event** button at the bottom of the page to save your entries. Upon the first save, an **Event ID** (10 digit number) and **Version** number will be assigned. The **Event Status** will be **Open**.



Under **Step 1: Define Event Basics**, click on the * **Event Settings and Options** hyperlink to set options for the event.

As you move through the create event process, it is important to periodically click **Save Event**.



Define Event Basics

The ***Event Settings and Options** link provides for the following options to be set as needed:

- **Allow Bidder XML Downloads**– Do not select.
- **Bid Required on All Lines**
- **Multiple Bids Allowed** – Do not select.
- **Allow Edit of Posted Bids**: Defaults to checked. Posted bids cannot be changed unless this box is checked when the event is created.

Event Settings and Options

Business Unit: 50100 Event ID: NEXT Round: 1 Version: 1 Event Format: Buy Event Type: RFx

☐ Allow Bidder XML Downloads
☐ Bid Required On All Lines
☐ Multiple Bids Allowed
☒ Allow Edit of Posted Bids

Round/Version Display:

Display Round and Version

☒ Sealed Event
☐ Display Bid Factor Weightings

Factor Event Score Into:

Total Score

 Start Price:

Do Not Display

Header Weighting: 100.00000
Line Factor Weighting:

☐ Bidders May Create Line Groups
☐ Allow Price Breaks with Groups

▶ Associated Categories

Save Event Changes

GoTo:

Go

18



Define Event Basics (continued)

The ***Event Settings and Options** link provides for the following options to be set as needed (continued):

- **Round\Version Display:** Defaults to **Display Round and Version** - Do not change.
- **Sealed Event:** Defaults to checked. Deselect, if applicable.
- **Display Bid Factor Weightings:** Buyers can add bid and weighting factors to help determine the award. Check if Request for Proposal (RFP) or Two-Step bid. For additional details on RFP, as well as bid factors and weighting, see the job aids titled **501 PR345: Request For Proposal (RFP)** and **501 PR345: Strategic Sourcing – Bid Factors, Weights & Score / Event Awards**.

Event Settings and Options

Business Unit: 50100 Event ID: NEXT Round: 1 Version: 1 Event Format: Buy Event Type: RFx

☐ Allow Bidder XML Downloads
☐ Bid Required On All Lines
☐ Multiple Bids Allowed
☒ Allow Edit of Posted Bids

Round\Version Display: Display Round and Version

☒ Sealed Event
☐ Display Bid Factor Weightings

Factor Event Score Into: Total Score

Header Weighting: 100.00000

Line Factor Weighting:

Start Price: Do Not Display

☐ Bidders May Create Line Groups
☐ Allow Price Breaks with Groups

Associated Categories

Save Event Changes

GoTo: Go



Define Event Basics (continued)

Additional fields on the **Events Settings and Options** page include:

- **Factor Event Score Intro** provides three options: **Line Score**, **Line Score**, and **Total Score**.
 - **Header or Line Factor Weighting:** Field availability is based on selection made for **Factor Event Score Intro** field.
- **Start Price:** Defaults to **Do Not Display**.

After updates are made, click **Save Event Changes** and click **Return to Event Overview** to return to the **Event Summary** page.

Event Settings and Options

Business Unit: 50100 Event ID: 0000150765 Round: 1 Version: 1 Event Format: Buy Event Type: RFx

☐ Allow Bidder XML Downloads
☐ Bid Required On All Lines
☐ Multiple Bids Allowed
☒ Allow Edit of Posted Bids

Round/Version Display: Display Round and Version

☒ Sealed Event
☐ Display Bid Factor Weightings

Factor Event Score Intro: Total Score
Header Weighting:
Line Factor Weighting:

Start Price: Do Not Display

☐ Bidders May Create Line Groups
☐ Allow Price Breaks with Groups

Associated Categories

Save Event Changes

GoTo: Go

< Return to Event Overview



Define Event Basics (continued)

When you return to the **Event Summary** page, click **Save Event**.

Under **Step 1: Define Event Basics**, click the **Event Comments and Attachments** hyperlink.

Favorites | Main Menu > Sourcing > Create Events > Event Details

Step 1: Define Event Basics

Enter basic information, general settings and optional rules for this event.

* [Event Settings and Options](#) [Payment Terms and Contact Info](#)
[Event Comments and Attachments](#) [Event Constraints](#)
[Event Header Bid Factors](#)

Step 2: Configure Line Items

Create line listings for this event.

* [Line Items](#) [Item Line Defaults](#)

Step 3: Select Bidders to Invite

Send out targeted invitations to this event, designate it as a public event, or both.

* [Bidder Invitations](#)

Step 4: Invite Collaborators

Invite others to collaborate on this event. You may not post your event while collaborators are reviewing it.

[Event Collaborators](#)

Step 5: Post Event

When all event creation activities are complete, click Post Event to release your event for scheduled external viewing and trigger any bidder invitations you may have defined.

[Save Event](#) [Post](#) [Save As Template](#) [Preview PDF](#)



Define Event Basics (continued)

Comments and attachments may be added to the event using the **Event Header Comments and Attachments** page.

The **Enter Comments** section allows you to type in notes about the event. The **Standard Comments** hyperlink allows you to choose predefined comments to add to the event.

- Click the **+ / -** to add or delete **Comments**.
- Check **Send to Bidder** or **Include on Award** if you want a specific comment included on the award.
- Add attachments to the event by clicking the **Add Attachment** button.
- Click **OK**.

Create an Event

Event Header Comments and Attachments

Event ID: NEXT

Enter Comments View All First 10 Last

Comments:

☐ Send To Bidder ☐ Include On Award

[Standard Comments](#)

Add Attachment

OK **Cancel** **Refresh**



Define Event Basics (continued)

From the **Event Header Comments and Attachments** page, scroll down to the bottom of the page and click **Save Event**. Once the event is saved, the **Event Summary** page will be displayed. These pages are identical, except in title.

From the **Event Summary** page, under **Step 1: Define Event Basics**, click the **Event Header Bid Factors** hyperlink.

Create an Event

Event Header Comments and Attachments

Business Unit: 50100 Event ID: 0000153487 Round: 1 Version: 1 Event Format: Buy

Event Type: Rfx [Change to Auction](#)

Event Status: Open

Preview Date: 06/13/2016 8:45AM EDT

* Solicitation Type: Request for Proposal

* Start Date: 06/27/2016 8:45AM EDT

* Event Name: Helen's Test

* End Date: 07/07/2016 8:45AM EDT

Description: Test RFP Event

Copy From:

Preview By: By Line

Required fields reside on pages marked with an asterisk (*) – you may not save your event until all required fields are filled.

Step 1: Define Event Basics

Enter basic information, general settings and optional rules for this event.

* Event Settings and Options

[Event Comments and Attachments](#)

[Event Header Bid Factors](#)

[Payment Terms and Contact](#)

[Event Constraints](#)

Step 2: Configure Line Items

Create line listings for this event.

* Line Items

[Item Line Defaults](#)

Step 3: Select Bidders to Invite

Send out targeted invitations to this event, designate it as a public event, or both.

* Bidder Invitations

Step 4: Invite Collaborators

Invite others to collaborate on this event. You may not post your event while collaborators are reviewing it.

[Event Collaborators](#)

Step 5: Post Event

When all event creation activities are complete, click Post Event to release your event for scheduled external viewing and trigger any bidder invitations you may have defined.

Save Event

Post

Save As Template

Preview PDF

Create an Event

Event Summary

Business Unit: 50100 Event ID: 0000153487 Round: 1 Version: 1 Event Format: Buy

Event Type: Rfx [Change to Auction](#)

Event Status: Open

Preview Date: 06/13/2016 8:45AM EDT

* Solicitation Type: Request for Proposal

* Start Date: 06/27/2016 8:45AM EDT

* Event Name: Helen's Test

* End Date: 07/07/2016 8:45AM EDT

Description: Test RFP Event

Copy From:

Preview By: By Line

Required fields reside on pages marked with an asterisk (*) – you may not save your event until all required fields are filled.

Step 1: Define Event Basics

Enter basic information, general settings and optional rules for this event.

* Event Settings and Options

[Event Comments and Attachments](#)

[Event Header Bid Factors](#)

[Payment Terms and Contact](#)

[Event Constraints](#)

Step 2: Configure Line Items

Create line listings for this event.

* Line Items

[Item Line Defaults](#)

Step 3: Select Bidders to Invite

Send out targeted invitations to this event, designate it as a public event, or both.

* Bidder Invitations

Step 4: Invite Collaborators

Invite others to collaborate on this event. You may not post your event while collaborators are reviewing it.

[Event Collaborators](#)

Step 5: Post Event

When all event creation activities are complete, click Post Event to release your event for scheduled external viewing and trigger any bidder invitations you may have defined.

Save Event

Post

Save As Template

Preview PDF



Define Event Basics (continued)

The **Event Header Bid Factors** hyperlink will take you to the **Event Bid Factors** page. This process is optional.

The bid factors selected here apply to the entire event and the resulting contract. Using the **Bid Factor** drop-down box, you can choose from predefined questions for the Bidder / Offeror. Bid factors may be assigned a weight depending on the level of importance.

When you are done selecting **Bid Factors**, click the **Return to Event Overview** hyperlink.

For additional details on using bid factors, refer to the job aids titled **501 PR345: Request For Proposal (RFP)** and **501 PR345: Strategic Sourcing – Bid Factors, Weights & Score / Event Awards..**

Modify an Event

Event Bid Factors

Event ID: 0000150765 Bid Factor Weighting Total: 0.00000
Event Name: District Fire Brigade Remaining Bid Factor Weight: 100.00000

| Bid Factors | | | |
|---|--|--------------------------|--------------------|
| Seq Nbr: | 1 | *Bid Factor: SWAMBUSINES | Weighting: 0.00000 |
| Question: | SWAM Business Classification Are you a Virginia "certified" Small business? | | |
| Type: Yes/No | | | |
| <input checked="" type="checkbox"/> Display Bid Factor? | | | |
| <input checked="" type="checkbox"/> Bid Factor Response Required | | | |
| <input type="checkbox"/> Ideal Response Required | | | |
| Yes/No <input checked="" type="radio"/> Yes <input type="radio"/> No | | | |



Step 1: Define Event Basics

[* Event Settings and Options](#)
[Event Comments and Attachments](#)
[Event Header Bid Factors](#)

Step 2: Configure Line Items

* Line Items

Item Line Defaults

Step 3: Select Bidders to Invite

* Bidder Invitations

Step 4: Invite Collaborators

Event Collaborators

Step 5: Post Event

When all event creation activities are complete, click **Post Event** to release your event for scheduled external viewing and trigger any bidder invitations you may have defined.

Post

[Preview PDF](#)



Define Event Basics (continued)

In the **Payment & Currency Information** section of the **Event Contact Details** page, **Bill Addr**s defaults, and in the **Event Contact** section your **Contact Name**, **Email ID**, and **Phone** also default. These fields can be modified.

If updates are made, click **Save Event Changes**. Click the **Return to Event Details** hyperlink to return to the **Event Summary** page and move on to Step 2.

Event Contact Details

Payment & Currency Information

*Currency:

USD

Exchange Rate

*Rate Type:

CRRNT

Pay Method:

Rate Date:

06/07/2016

Payment Terms:

Allow bids in other currencies

Bill Addr:

CNTRL OFF3

Tax Exempt

Buyer:

YANI.HO

Exempt ID:

Event Contact

Contact Name:

Ho, Yani (VDOT)

Email ID:

yani.ho@vdot.virginia.gov

Phone:

Save Event Changes

GoTo:

Go

< Return to Event Overview



Step 1: Define Event Basics

Enter basic information, general settings and optional rules for this event.

* [Event Settings and Options](#)
[Payment Terms and Contact Info](#)
[Event Comments and Attachments](#)
[Event Constraints](#)
[Event Header Bid Factors](#)

Step 2: Configure Line Items

Create line listings for this event.

* [Line Items](#)
[Item Line Defaults](#)

Step 3: Select Bidders to Invite

Send out targeted invitations to this event, designate it as a public event, or both.

* [Bidder Invitations](#)

Step 4: Invite Collaborators

Invite others to collaborate on this event. You may not post your event while collaborators are reviewing it.

[Event Collaborators](#)

Step 5: Post Event

When all event creation activities are complete, click Post Event to release your event for scheduled external viewing and trigger any bidder invitations you may have defined.

Save EventPostSave As TemplatePreview PDF



Configure Line Items (continued)

On the **Line Items** page, using the **Basic Definition** tab, you configure a line item with the following:

- **Item ID**
- **Category**
- **Description**
- **UOM** (Unit of measure)
- **Qty** (Quantity)
- **Start Price**
- **Weighting**

Line Items

Business Unit: 50100 Event ID: 0000153480 Round: 1 Version: 1 Event Format: Buy Event Type: RFX
Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.
Copy From:

Purchase Order

Go

 Filtered View:

Only Lines

Line Items

Basic Definition

Advanced Definition

| Line | Group ID | Item ID | Description | Category | UOM | Qty | Start Price | Ext. Amount | Weighting | | |
|----------------------------|-------------------|-----------------------|---|--------------------|---------------|-------------------|---------------------|-------------|--------------------|--------------|--------------|
| <input type="checkbox"/> 1 | | <div>0051404000</div> | ABRASIVES, PLASTONE ABRASIVES, PLASTONE | <div>0051404</div> | EA | <div>5.0000</div> | <div>169.0000</div> | \$845.00 | <div>0.00000</div> | <div>+</div> | <div>-</div> |
| <input type="checkbox"/> 2 | | <div>0051404055</div> | ABRASIVES, PLASTONE 1 IN. X 50 YDS. ROLL, 320 GRIT | <div>0051404</div> | RO | <div>1.0000</div> | <div>0.0100</div> | \$0.01 | <div>0.00000</div> | <div>+</div> | <div>-</div> |
| <input type="checkbox"/> 3 | | <div>0051404115</div> | ABRASIVES, PLASTONE 1-1/2 IN. W, 30 FT. ROLL, 120 GRIT | <div>0051404</div> | RO | <div>1.0000</div> | <div>0.0100</div> | \$0.01 | <div>0.00000</div> | <div>+</div> | <div>-</div> |
| <input type="checkbox"/> 4 | ABRASIVE ROLLS | | <div>Abrasive Plastone Rolls</div> | | <div>10</div> | <div>1.0000</div> | <div>0.0200</div> | \$0.02 | <div>0.00000</div> | <div>+</div> | <div>-</div> |

Event Total: 845.0200 USD Line Weighting Total: 100 % Remaining Weight: 0 %
Add Selected Lines to Group:

OK

< Return to Event Overview

Save Event Changes

GoTo:

Go

If you do not enter line weightings, each line item is weighted equally. For additional details on weighting line items, refer to the job aid titled **501 PR345: Strategic Sourcing – Bid Factors, Weights & Score / Event Awards**.

28



Configure Line Items (continued)

Basic Definition tab:

- You may add a line item using the **Item ID** or **Category** lookup, or by copying from another transaction:
 - Item ID:** Click the **Look up** icon and select the item. Once selected, details for that item are displayed and include **Description, Category, UOM, and Start Price**. **Description, Category, and UOM** are fixed and cannot be changed. **Qty** must be entered.
 - Category:** When selecting by **Category**, you must enter a **Description, UOM, Qty**, and **Start Price**.
 - Copy From:** Copy line information from a Contract, PO, Request for Information, Requisition, Sourcing Event, Sourcing Template, etc.

Line Items

Business Unit: 50100 Event ID: 0000153480 Round: 1 Version: 1 Event Format: Buy Event Type: Rfx

Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From: Purchase Order Go Filtered View: Only Lines

Line Items Customize Find View All First 1-4 of 4 Last

Basic Definition Advanced Definition

| Line | Group ID | Item ID | Description | Category | UOM | *Qty | Start Price | Ext. Amount | Weighting | |
|----------------------------|-------------------|------------|---|----------|-----|--------|-------------|-------------|-----------|-----|
| <input type="checkbox"/> 1 | | 0051404000 | ABRASIVES, PLASTONE ABRASIVES, PLASTONE | 0051404 | EA | 5.0000 | 169.0000 | \$845.00 | 0.00000 | + - |
| <input type="checkbox"/> 2 | | 0051404055 | ABRASIVES, PLASTONE 1 IN. X 50 YDS. ROLL, 320 GRIT | 0051404 | RO | 1.0000 | 0.0100 | \$0.01 | 0.00000 | + - |
| <input type="checkbox"/> 3 | | 0051404115 | ABRASIVES, PLASTONE 1-1/2 IN. W, 30 FT. ROLL, 120 GRIT | 0051404 | RO | 1.0000 | 0.0100 | \$0.01 | 0.00000 | + - |
| <input type="checkbox"/> 4 | ABRASIVE ROLLS | | Abrasive Plastone Rolls | | 10 | 1.0000 | 0.0200 | \$0.02 | 0.00000 | + - |

Event Total: \$45.0200 USD

Add Selected Lines to Group: OK

< Return to Event Overview

GoTo: Go

Save Event Changes

Line Weighting Total: 100 % Remaining Weight: 0 %



Configure Line Items (continued)

Basic Definition tab (continued):

- **Weighting:** This field defaults to 0.00000 and does not need to be modified.
- If you do not enter line weightings, each line item is weighted equally.
- At the bottom of the **Line Items** section is **Line Weighting**. The sum of the weightings for all lines must equal 100%. If it is not equal to 100%, the **Remaining Weight** will indicate the amount left to distribute.

Click on the **Advanced Definition** tab to further define lines.

Line Items

Business Unit: 50100 Event ID: 0000153480 Round: 1 Version: 1 Event Format: Buy Event Type: RFx

Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From:

Filtered View:

LINE ITEMS

Basic Definition **Advanced Definition**

| Line | Group ID | Item ID | Description | Category | *UOM | *Qty | Start Price | Ext. Amount | Weighting | | |
|----------------------------|-------------------|---|---|--|---|-------------------------------------|---------------------------------------|-------------|--------------------------------------|----------------------------------|----------------------------------|
| <input type="checkbox"/> 1 | | <input type="text" value="0051404000"/> <input type="button" value="Search"/> | ABRASIVES, PLASTONE ABRASIVES, PLASTONE | <input type="button" value="Catalog"/> 0051404 | EA | <input type="text" value="5.0000"/> | <input type="text" value="169.0000"/> | \$845.00 | <input type="text" value="0.00000"/> | <input type="button" value="+"/> | <input type="button" value="-"/> |
| <input type="checkbox"/> 2 | | <input type="text" value="0051404055"/> <input type="button" value="Search"/> | ABRASIVES, PLASTONE 1 IN. X 50 YDS. ROLL, 320 GRIT | <input type="button" value="Catalog"/> 0051404 | RO | <input type="text" value="1.0000"/> | <input type="text" value="0.0100"/> | \$0.01 | <input type="text" value="0.00000"/> | <input type="button" value="+"/> | <input type="button" value="-"/> |
| <input type="checkbox"/> 3 | | <input type="text" value="0051404115"/> <input type="button" value="Search"/> | ABRASIVES, PLASTONE 1-1/2 IN. W, 30 FT. ROLL, 120 GRIT | <input type="button" value="Catalog"/> 0051404 | RO | <input type="text" value="1.0000"/> | <input type="text" value="0.0100"/> | \$0.01 | <input type="text" value="0.00000"/> | <input type="button" value="+"/> | <input type="button" value="-"/> |
| <input type="checkbox"/> 4 | ABRASIVE ROLLS | | <input type="text" value="Abrasive Plastone Rolls"/> | <input type="button" value="Catalog"/> | <input type="text" value="10"/> <input type="button" value="Search"/> | <input type="text" value="1.0000"/> | <input type="text" value="0.0200"/> | \$0.02 | <input type="text" value="0.00000"/> | <input type="button" value="+"/> | <input type="button" value="-"/> |

Event Total: 845.0200 USD

Line Weighting Total: 100 % Remaining Weight: 0 %

Add Selected Lines to Group:

[< Return to Event Overview](#)

GoTo:

The **Filtered View** changes your view on this page. You can select **All Lines and Groups**, **Only Groups**, or **Only Lines**.



Configure Line Items (continued)

On the **Line Items** page, using the **Advanced Definition** tab, you configure a line item with the following:

- Click on the **Details** hyperlink to access the **Line Details** page where you can:
 - Add **Shipping Information**
 - Configure **Bid Parameters** such as **Min Quantity** and **Max Quantity** as well as **User Defined Price Breaks**
 - Specify item details

Line Items

Business Unit: 50100 Event ID: NEXT Round: 1 Version: 1 Event Format: Buy Event Type: RFX

Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From: Go

Filtered View: All Lines and Groups

Line Items

Basic Definition Advanced Definition

Customize Find View All First 1-4 of 4 Last

| Line | Group ID | Item ID | Description | Item SetID | Belongs to or Contains | Details | Bid Factors | Constraints | | | |
|---------------------------------------|-------------------|---|---|------------|----------------------------|-------------------------|-----------------------------|-------------|--|--|--|
| <input type="checkbox"/> 1 | | <input type="text" value="0051404000"/> | ABRASIVES, PLASTONE ABRASIVES, PLASTONE | STATE | - | Details | Bid Factors | No | | | |
| <input type="checkbox"/> 2 | | <input type="text" value="0051404055"/> | ABRASIVES, PLASTONE 1 IN. X 50 YDS. ROLL, 320 GRIT | STATE | 1 Group(s) | Details | Bid Factors | No | | | |
| <input type="checkbox"/> 3 | | <input type="text" value="0051404115"/> | ABRASIVES, PLASTONE 1-1/2 IN. W, 30 FT. ROLL, 120 GRIT | STATE | 1 Group(s) | Details | Bid Factors | No | | | |
| <input checked="" type="checkbox"/> 4 | ABRASIVE ROLLS | | <input type="text" value="Abrasive Plaston Rolls"/> | STATE | 2 Line(s) | Details | Bid Factors | No | | | |

Event Total: 845.0200 USD Line Weighting Total: 100 % Remaining Weight: 0 %

Add Selected Lines to Group: OK

[Return to Event Overview](#)

GoTo: Go

Save Event Changes



Configure Line Items (continued)

Home | W

Favorites | Main Menu > Sourcing > Create Events > Event Details

New Window ?

Create an Event

Line Items

Business Unit: 50100 Event ID: NEXT Round: 1 Version: 1 Event Format: Buy Event Type: RFx

Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From: Contract Go

Filtered View: All Lines and Groups

Line Items

Basic Definition Advanced Definition

Customize | Find | View All | First 1-4 of 4 Last

| Line | Item ID | Description | Item SetID | Belongs to or Contains | Details | Bid Factors | Constraints | | | |
|----------------------------|------------|--|------------|------------------------|---------|-------------|-------------|--|--|--|
| <input type="checkbox"/> 1 | 9415901000 | INSPECTION/EXAMINATION SERVICE STATE | | - | Details | Bid Factors | No | | | |
| <input type="checkbox"/> 2 | 7451220550 | ASPHALT, LIQUID, HOT OIL, SUMMER, CRS-2 | STATE | - | Details | Bid Factors | No | | | |
| <input type="checkbox"/> 3 | 9752465600 | HIRED EQUIPMENT, CONSTRUCTION, PER VADOT SPECIFICATIONS SAW, CONCRETE/METAL, HAND-HELD, MOTORIZED, WITH OPERATOR | STATE | - | Details | Bid Factors | No | | | |
| <input type="checkbox"/> 4 | 9752465600 | HIRED EQUIPMENT, CONSTRUCTION, PER VADOT SPECIFICATIONS SAW, CONCRETE/METAL, HAND-HELD, MOTORIZED, WITH OPERATOR | STATE | - | Details | Bid Factors | No | | | |



Configure Line Items (continued)

From the **Line Details** page, you can schedule delivery on a specific **Due Date** and **Ship To** location. Only one schedule is allowed per line item.

Once all data is entered, click **OK** to return to the **Line Items** page.

Line Details

Event ID:0000153496

Line:1

Item ID:0051404000

Description:ABRASIVES, PLASTONE ABRASIVES, PLASTONE

☐ Item Biddable Only if Grouped

Requested Quantity:5.0000

Start Price:169.0000

Physical Nature:Goods

Shipping Information

Schedule:1

Quantity:5.0000

Due Date:07/09/2016

Freight Terms:

Ship Via:

Ship To:NOVA DIS

Ship From:

Bid Parameters

☐ Bid Required

Reserve Price:

Min Quantity:0.0000

Max Quantity:0.0000

Bid Quantity Rule:Bid Up to Maximum Quantity

Alternate UOM:Not Allowed

☐ User Defined Price Breaks

☐ Bidder Defined Price Breaks

Item Specification

Line Image

OK

Cancel

Refresh



Configure Line Items (continued)

On the **Line Items** page, using the **Advanced Definition** tab, you configure a line item with the following:

Line **Bid Factors** are specific to each line (good or service).

- Price is by default the first bid factor for any line.
- The **Bid Factors** hyperlink takes you to the **Line Bid Factors** page where you can add or modify the bid factors.

Line Items

Business Unit: 50100 Event ID: NEXT Round: 1 Version: 1 Event Format: Buy Event Type: RFX

Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From: Go

Filtered View: All Lines and Groups

Line Items

Basic Definition Advanced Definition

| | Line | Group ID | Item ID | Description | Item SetID | Belongs to or Contains | Details | Bid Factors | Constraints | | | |
|-------------------------------------|------|-------------------|---|---|------------|----------------------------|-------------------------|-----------------------------|-------------|--|--|-------------------------------------|
| <input type="checkbox"/> | 1 | | <input type="text" value="0051404000"/> | ABRASIVES, PLASTONE ABRASIVES, PLASTONE | STATE | - | Details | Bid Factors | No | | | + - |
| <input type="checkbox"/> | 2 | | <input type="text" value="0051404055"/> | ABRASIVES, PLASTONE 1 IN. X 50 YDS. ROLL, 320 GRIT | STATE | 1 Group(s) | Details | Bid Factors | No | | | + - |
| <input type="checkbox"/> | 3 | | <input type="text" value="0051404115"/> | ABRASIVES, PLASTONE 1-1/2 IN. W, 30 FT. ROLL, 120 GRIT | STATE | 1 Group(s) | Details | Bid Factors | No | | | + - |
| <input checked="" type="checkbox"/> | 4 | ABRASIVE ROLLS | | <input type="text" value="Abrasive Plaston Rolls"/> | STATE | 2 Line(s) | Details | Bid Factors | No | | | + - |

Event Total: 845.0200 USD

Line Weighting Total: 100 % Remaining Weight: 0 %

Add Selected Lines to Group: OK

[Return to Event Overview](#)

GoTo: Go

Save Event Changes

For additional details on using bid factors, refer to the job aid titled **501 PR345: Strategic Sourcing – Bid Factors, Weights & Score / Event Awards**.



Configure Line Items (continued)

On the **Line Items** page, using the **Advanced Definition** tab, you configure a line item with the following:

During event creation, users can select lines that they want to group to attempt to get better pricing through a bundled price quote.

- **Add Selected Lines to Group:** If you wish to award specific lines by group simply select the checkbox for the lines you wish to group.
- Enter the details and click **OK**.

Line Items

Business Unit: 50100 Event ID: 0000153480 Round: 1 Version: 1 Event Format: Buy Event Type: RFx

Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From: Purchase Order Go Filtered View: Only Lines

Line Items

Basic Definition Advanced Definition

| Line | Item ID | Description | Item SetID | Belongs to or Contains | Details | Bid Factors | Constraints | | |
|-------------------------------------|---------|-------------|--|------------------------|---------|-------------|-------------|----|-----|
| <input type="checkbox"/> | 1 | 0051404000 | ABRASIVES, PLASTONE ABRASIVES, PLASTONE | STATE | - | Details | Bid Factors | No | + - |
| <input checked="" type="checkbox"/> | 2 | 0051404055 | ABRASIVES, PLASTONE 1 IN. X 50 YDS. ROLL, 320 GRIT | STATE | - | Details | Bid Factors | No | + - |
| <input checked="" type="checkbox"/> | 3 | 0051404115 | ABRASIVES, PLASTONE 1-1/2 IN. W, 30 FT. ROLL, 120 GRIT | STATE | - | Details | Bid Factors | No | + - |

Event Total: 845.0000 USD Line Weighting Total: 100 % Remaining Weight: 0 %

Add Selected Lines to Group: [Add to New Group] OK

Group ID: Abrasive Rolls

Description: Abrasive Plastone Rolls

< Return to Event Overview

Save Event Changes

GoTo: Go



Configure Line Items (continued)

On the **Line Items** page, using the **Advanced Definition** tab, you configure a line item with the following:

- **Line Comments** and **Attachments** icon:
Add comments and upload attachments.
- Squiggly lines inside the **Line Comments** and **Attachments** icon indicates comments or attachments have been added to the line.
- You can flag your comment to be sent to the Bidder and/or included on the award.
- When your comments have been entered, click **OK** to return to the **Line Items** page.
- From the **Line Items** page, click **Return to Event Overview**.




Line Items

Business Unit: 50100 Event ID: 0000153480 Round: 1 Version: 1 Event Format: Buy Event Type: RFX

Your event may consist of items from your item catalog and, optionally, ad-hoc items. You can create the event lines manually, or by copying lines from an existing event or template, or other allowed transaction types.

Copy From: Purchase Order Go Filtered View: Only Lines

Line Items Basic Definition **Advanced Definition** Customize Find View All First 1-3 of 3 Last

| Line | Item ID | Description | Item SetID | Belongs to or Contains | Details | Bid Factors | Constraints | | |
|----------------------------|------------|---|------------|------------------------|---------|-------------|-------------|---|---|
| <input type="checkbox"/> 1 | 0051404000 | ABRASIVES, PLASTONE ABRASIVES, PLASTONE | STATE | - | Details | Bid Factors | No |  |   |

Modify an Event

Line Comments and Attachments

Event ID: 0000153499 Line Number: 2

Enter Comments Find View All First 1 of 1 Last


Comments:

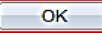

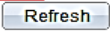
Type in your comments here or you may choose to click on the Standard Comments hyperlink to select a predefined comment. You may also select the Include on Award checkbox if you would like this comment included on the award.

If you need to add more comments simply click on the + icon to the right of the comment box.

You can add an attachment too. Just click on the Add Attachment button below.

☐ Send To Bidder ☒ Include On Award [Fetch Item Specs](#) [Standard Comments](#)





When you return to the **Event Summary** page, click **Save Event**. Next, under **Step 3: Select Bidders to Invite**, click on the * **Bidder Invitations** hyperlink to go to the event **Invite Bidders** page.

37



Select Bidders / Offerors to Invite (continued)

State procurement guidelines require that all events be open to the public. Cardinal requires that you invite at least one bidder or make the event a **Public Event**. Bid Processors have the ability to enter new or additional bidders prior to posting.

On the **Invite Bidders** page, select the **Public Event** checkbox to open the event to the public. You may also select specific bidders to invite using the **Search for Bidders** hyperlink. The bidders invited will be displayed on the **Bidder Invitation List**.

Click on the **Search for Bidders** hyperlink to go to the **Bidder Search** page.

Invite Bidders

Business Unit: 50100 Event ID: 0000153480 Round: 1 Version: 1 Event Format: Buy Event Type: RFx

☒ Public Event

Bidder Invitation List

Customize | Find | View All | First 1 of 1 Last

| | Select | Bidder ID | Bidder Type | Location | Name | *Dispatch Method | | |
|---|--------------------------|------------|-------------|----------|------------------------|------------------|--|--|
| 1 | <input type="checkbox"/> | PUBLIC_AUC | Public | 1 | This is a Public Event | Email | | |

Search for Bidders

Dispatch Lines

Save Bidders as Group

Save Event Changes

GoTo:

Go

[< Return to Event Overview](#)



Select Bidders / Offerors to Invite (continued)

Use the **Bidder Search** page to find Bidders / Offerors to add to the **Bidder Invitation List**. You can be very specific in your search criteria (e.g., **Name** or **ID**) or extremely broad (e.g., **State** or **Item ID**). Once you find your Bidder, check the **Invite** box (column to the right in the **Search Results**) and click **OK**.

Bidder Search

Search Criteria

Bidder Type: Vendor

Name:

ID:

Contact:

Group ID:

State: VA

City:

Country:

Postal:

Type:

SIC Type:

SIC Code:

Item ID: 9103955455

Group Name:

Results Option: Display Bidder/Company Id Only

Search

Recommend Bid

Search Results

Customize | Find | View All | First 1-50 of 50 Last

| Bidder ID | Location | Bidder Company | Invite |
|--------------|----------|--------------------------------|-------------------------------------|
| 1 0000000000 | MAIN | PUBLIC EVENT | <input checked="" type="checkbox"/> |
| 2 0000000003 | MAIN | Aspect Software | <input type="checkbox"/> |
| 3 0000000004 | MAIN | Benson Woodworking Co Inc | <input checked="" type="checkbox"/> |
| 4 0000000005 | MAIN | SIS-USA inc | <input checked="" type="checkbox"/> |
| 5 0000000006 | MAIN | CRYO Industries of America Inc | <input type="checkbox"/> |
| 6 0000000007 | MAIN | LYME COMPUTER SYSTEMS INC | <input type="checkbox"/> |
| 7 0000000008 | MAIN | Chip Taylor Communications | <input type="checkbox"/> |
| 8 0000000009 | MAIN | GT Sapphire Systems Group LLC | <input type="checkbox"/> |

OK

Cancel

Refresh



Select Bidders / Offerors to Invite (continued)

Vendors invited using the **Bidder Search** page now display on the **Invite Bidders** page. If you plan to invite this group of bidders for multiple events, you can **Select** them and click the **Save Bidders as Group** link. Follow the prompts to save them under a group name.

Once all Bidders are on the **Bidder Invitation List**, click **Save Event Changes**. Once saved, to return to the **Event Summary** page, click **Return to Event Overview**.

Invite Bidders

Business Unit:50100Event ID:0000153480Round:1Version:1Event Format:BuyEvent Type:RFx

☒ Public Event

Bidder Invitation List

CustomizeFindView All

First1-4 of 4Last

| | Select | Bidder ID | Bidder Type | Location | Name | *Dispatch Method | | |
|---|--------------------------|-------------|-------------|----------|---------------------------|------------------|--|--|
| 1 | <input type="checkbox"/> | PUBLIC_AUC | Public | 1 | This is a Public Event | Email | | |
| 2 | <input type="checkbox"/> | 00000000000 | Vendor | MAIN | PUBLIC EVENT | <div>Print</div> | | |
| 3 | <input type="checkbox"/> | 00000000004 | Vendor | MAIN | Benson Woodworking Co Inc | <div>Print</div> | | |
| 4 | <input type="checkbox"/> | 00000000005 | Vendor | MAIN | SIS-USA inc | <div>Print</div> | | |

[Search for Bidders](#)

[Dispatch Lines](#)

[Save Bidders as Group](#)

Save Event Changes

[< Return to Event Overview](#)

GoTo:

Go



When you return to the **Event Summary** page, under **Step 4: Invite Collaborators**, click on the * **Event Collaborators** hyperlink to go to the event **Invite Collaborators** page. This is optional.

Step 1: Define Event Basics

[* Event Settings and Options](#)
[Event Comments and Attachments](#)
[Event Header Bid Factors](#)

Step 2: Configure Line Items

* Line Items

Step 3: Select Bidders to Invite

* Bidder Invitations

Step 4: Invite Collaborators

Event Collaborators

Step 5: Post Event

Save Event

Post

Save As Template

[Preview PDF](#)

41



Invite Collaborators (continued)

Events do not route to managers, or other users, unless they are selected as a Collaborator. A routing sequence is established as you invite the Collaborators. You may modify the sequence to ensure the event is reviewed by the Collaborators in the order you wish.

When you add Collaborators, a link to the event routes to their worklist. You, as the originator of the event, will receive a message when all collaboration is complete.

Once all the details have been set and Collaborators added, click **OK** and then **Save Event** to return to the **Event Summary** page.

Modify an Event

Event Collaboration Details

Collaboration Due Date: 06/22/2016 Time: 3:45PM

Save As Group

Analysis Collab Due Date

Invited Collaborators

| Collaborator Oprid | Name | Routing Sequence | | |
|--------------------|----------------------|------------------|---|---|
| A.HETZER | Hetzer, Andy (VDOT) | 2 | + | - |
| A.SCOTT | Scott, Andrew (VDOT) | 1 | + | - |

Find Collaborators

OK Cancel Refresh

For additional instructions on collaboration, refer to the job aid titled **501 PR345: Strategic Sourcing Collaboration**.



Post an Event for Bidding

Once the event creation steps are complete, be sure to click **Save Event**. You are now ready to **Post** the event for bidding.

- Prior to posting the event, click **Preview PDF** to send an e-mail to the Buyer with a detailed PDF event summary. This PDF will be used for the manual posting to eVA.
- Click **Post** to post the event for bidding.
- The **Preview PDF** and **Post** buttons are no longer available.

Favorites | Main Menu > Sourcing > Create Events > Event Details

Step 1: Define Event Basics

Enter basic information, general settings and optional rules for this event.

[* Event Settings and Options](#) [Payment Terms and Contact Info](#)
[Event Comments and Attachments](#) [Event Constraints](#)
[Event Header Bid Factors](#)

Step 2: Configure Line Items

Create line listings for this event.

[* Line Items](#)

Step 3: Select Bidders to Invite

Send out targeted invitations to this event, designate it as

[* Bidder Invitations](#)

Step 4: Invite Collaborators

Invite others to collaborate on this event. You may not p

[Event Collaborators](#)

Step 5: Post Event

When all event creation activities are complete, click P and trigger any bidder invitations you may have defined.

Message

This will submit the Event for Approval. (18058,207)

Once the event is approved and posted you will be limited to the changes that you can make to the event. Click OK to continue or Cancel if you are not done making changes to the event.

Message

Do you want to create preview Event PDF and send it to xxxyani.ho@vdot.virginia.gov? (18058,1925)

Select Yes to create the file or No to return to the Event.



Post an Event for Bidding (continued)

The **Event Details** PDF document that is sent to the Buyer is detailed below. This document is included with the information sent to eVA to be posted on Virginia’s eProcurement Portal.

Event Details

Commonwealth of Virginia
Department of Transportation

| | | | |
|-------------------------|---------|-------------------------|------|
| Event ID | Format | Type | Page |
| 50100-0000150219 | Buy | IFB Sealed Contract | 1 |
| Event Round | Version | | |
| 1 | 1 | | |
| Event Name | | | |
| MJH TEST001 | | | |
| Start Date/Time | | Close Date/Time | |
| 10/17/2011 16:58:00 EDT | | 10/18/2011 15:58:00 EDT | |

Event Currency:

US Dollar

Bids allowed in other currency:

No

Bidder:

General Public

Submit To:

VA Dept of Transportation
VDOT Central Office
1201 E Broad St
Richmond VA 23219
United States

Contact:

Super User PR

Phone:

Email:

Event Description

I. PURPOSE:

The Virginia Department of Transportation (herein referred to as "VDOT") is soliciting bids from interested firms to provide

PERIOD OF CONTRACT: From _____ through _____ (renewable)

The IFB must state either "from date of award," or specified date to a specified ending date, or delivery of goods or services.

If it will be a renewable term contract, put the word "renewable" in parenthesis after the "through" date if the contract contains a renewal clause. This will let potential bidders know right away if you anticipate the contract to go beyond the initial period. This is also restated under the Special Terms and Conditions under the Term of Contract clause.

See the example IFB provided.

II. QUESTIONS REGARDING THIS INVITATION FOR BID:

Any questions regarding this invitation for bid shall be addressed to Mr./Ms. Contract Officers Name at (804) 000-0000. The issuing office shall determine whether any addendum should be issued as a result of any questions or other matters raised.

44



Simulation: Creating a Strategic Sourcing Event

You are about to view a simulation entitled **Creating a Strategic Sourcing Event**. Click the Cardinal logo below to start the simulation.





Lesson 2: Summary

In this lesson, you learned:

- Copying from another document provides a shortcut that eliminates some duplicate entry. You can create an event by copying from a:
 - Requisition
 - Event
 - Contract
 - PO
- There are five steps to creating a new Strategic Sourcing event:
 1. Define Event Basics
 2. Configure Line Items
 3. Select Bidders to Invite
 4. Invite Collaborators (optional)
 5. Post Event



Lesson 3: Maintain Events

This lesson covers the following topics:

- Using the Event Workbench
- Change an Event - Versions



Using the Event Workbench

The **Event Workbench** is used to view and manage events, as well as create new versions (addendums). Using the **Event Workbench**, the Strategic Sourcing Buyer can also cancel an event.

You can navigate to the **Event Workbench** page using the following path:

Main Menu > Sourcing > Maintain Events > Event Workbench

FavoritesMain Menu > Sourcing > Maintain Events > Event Workbench

New Window

Event Workbench

Search Criteria

Event ID:

From Start Date:

To Start Date:

Sort With:

Created By:

From End Date:

To End Date:

Sort Order:

Event Format:

Category:

Only show Events I created

☐

Use my search defaults

☐

Event Type:

Item ID:

Search

Reset

Event Status:

Description:

Default Search Preferences

Associated With Plan:

Plan Name:

Legend

Search Results

Find | View 100 | First | 1-25 of 118 | Last

| Event ID | Name | Format | Type | Unit | Status | | | | |
|------------|-----------------------|--------|------|-------|-----------------|---|---|----|---|
| 0000150073 | Event Template | Buy | RFx | 50100 | Open | ✖ | 📖 | | |
| 0000150047 | 02.PR.04.05 step17... | Buy | RFx | 50100 | Open | ✖ | 📖 | | |
| 0000150046 | Test 02.PR.04.06 | RFI | RFx | 50100 | RFI Completed | ✖ | 📖 | 🗨️ | 📄 |
| TNC | Terms and Conditio... | Buy | RFx | 50100 | Open | ✖ | 📖 | | |
| 0000150065 | TEST KA | Buy | RFx | 50100 | Event Completed | ✖ | 📖 | 🗨️ | 📄 |
| 0000150064 | SS TEST | Buy | RFx | 50100 | Open | ✖ | 📖 | | |
| 0000150063 | SOLE SOURCE REST 1... | Buy | RFx | 50100 | Open | ✖ | 📖 | | |
| 0000150061 | 01PR0402F | Buy | RFx | 50100 | Event Completed | ✖ | 📖 | 🗨️ | 📄 |
| 0000150060 | 01PR0402F | Buy | RFx | 50100 | Event Completed | ✖ | 📖 | 🗨️ | 📄 |

48



The **Event Workbench** page has three sections: **Search Criteria**, **Legend**, and **Search Results**.

The **Search Criteria** section allows you to search for a specific event using any combination, or all, of the available fields. The criteria helps to narrow your search results.

49



Using the Event Workbench (continued)

The **Legend** section of the **Event Workbench** page can be expanded to see descriptions for each of the icons used in the **Search Results**:

Event Workbench

Search Criteria

Event ID:

Created By:

Event Format:

Event Type:

Event Status:

Associated With Plan:

From Start Date:

From End Date:

Category:

Item ID:

Description:

Plan Name:

To Start Date:

To End Date:

Sort With:

Sort Order:

☐ Only show Events I created

☐ Use my search defaults

Search

Reset

Default Search Preferences

Legend

Pause

Resume

Cancel

Approval Status

Event History

Analyze Bids

Edit Event

New Version

View Collaboration

Collaboration Available

Collaboration Checked Out

Bid History

Search Results

Find | View 100 | First | 1-25 of 118 | Last

| Event ID | Name | Format | Type | Unit | Status | | |
|----------------------------|-----------------------|--------|------|-------|-----------------|--|--|
| 0000150073 | Event Template | Buy | RFx | 50100 | Open | | |
| 0000150047 | 02.PR.04.05 step17... | Buy | RFx | 50100 | Open | | |
| 0000150046 | Test 02.PR.04.06 | RFI | RFx | 50100 | RFI Completed | | |
| TNC | Terms and Conditio... | Buy | RFx | 50100 | Open | | |
| 0000150065 | TEST KA | Buy | RFx | 50100 | Event Completed | | |
| 0000150064 | SS TEST | Buy | RFx | 50100 | Open | | |



Using the Event Workbench (continued)

Event Workbench Legend section icons:

Legend

Pause

Resume

Cancel

Approval Status

Event History

Analyze Bids

Edit Event

New Version

View Collaboration

Collaboration Available

Collaboration Checked Out

Bid History

- Pause:** Not used
- Edit Event:** Edit details of the event.
- Resume:** Not used
- New Version:** Create a copy of the current to make a new version, or edit a current version of the event.
- Cancel:** Cancel the event. This cannot be undone.
- View Collaboration:** View Collaborators' recommended changes.
- Approval Status:** Determine whether event is approved.
- Collaboration Available:** Collaborators use this icon to preview the event and add recommendations.
- Event History:** View the event's **Version** history, **Event Stage**, and **Event Status**.
- Collaboration Checked Out:** The event is checked out by a Collaborator. The Collaborator's name displays when you move your cursor over this button.
- Analyze Bids:** View the **Status** and bids for the event.
- Bid History:** View the bid / proposal invitation status and bidding history for the specified event.



Using the Event Workbench (continued)

The **Search Results** section of the **Event Workbench** lists all events matching your search criteria. Click the arrow on the left side of the line to display the line items for the selected event. Click on the **Event ID** hyperlink to open the **Modify an Event – Event Summary** page. This is the same page where the initial five create event steps were configured. From this page, you can review the event details.

Event Workbench

Search Criteria

Event ID:

Created By:

Event Format:

Event Type:

Event Status:

Associated With Plan:

From Start Date:

From End Date:

Category:

Item ID:

Description:

Plan Name:

To Start Date:

To End Date:

Sort With:

Sort Order:

☐ Only show Events I created

Legend

Search Results

| Event ID | Name | Format | Type | |
|------------|-----------------------|--------|------|--|
| 0000153493 | Award by Group (LO... | Buy | RFx | |
| 0000153495 | test | Buy | RFx | |
| 0000153492 | Award by Line #2 | Buy | RFx | |
| 0000153491 | Award by Line | Buy | RFx | |
| 0000153490 | By Total | Buy | RFx | |

| Line | Category | Item ID | Item Description |
|------|----------|------------|------------------------------------|
| 1 | 0051404 | 0051404000 | ABRASIVES, PLASTONE AB PLASTONE |

Modify an Event

Event Summary

Business Unit: 50100

Event ID: 0000153490

Round: 1

Version: 1

Event Format: Buy

Event Type: RFx

Event Status: Posted

*Solicitation Type: Request for Proposal

Event Name: By Total

Description: By Total

Preview Date: 06/13/2016 1:28PM EDT

Start Date: 06/27/2016 1:28PM EDT

End Date: 07/07/2016 1:28PM EDT

Copy From:

Go

Required fields reside on pages marked with an asterisk (*) – you may not save your event until all required fields are filled.

Step 1: Define Event Basics

Enter basic information, general settings and optional rules for this event.

* Event Settings and Options

Event Comments and Attachments

Event Header Bid Factors

Payment Terms and Contact Info

Event Constraints

Step 2: Configure Line Items

Create line listings for this event.

* Line Items

Item Line Defaults



Change an Event- Versions

Event version control is used to track changes (addendums) made to a posted event.

You can use the **Event Workbench** to create and edit versions. When you are viewing a multiversion event, the system always displays the most recent version of the event. When you create a new event version, the version number increments by one. When you post the new version, the previous version becomes read-only.

To create a new version, click the **New Version** icon on the **Event Workbench**.

FavoritesMain Menu > Sourcing > Maintain Events > Event WorkbenchNew Window

Event Workbench

Search Criteria

Event ID:

Created By:

Event Format:

Event Type:

Event Status:

Associated With Plan:

From Start Date:

From End Date:

Category:

Item ID:

Description:

Plan Name:

To Start Date:

To End Date:

Sort With:

Sort Order:

Only show Events I created

Use my search defaults

Search

Reset

Default Search Preferences

Legend

Pause

Edit Event

New Version

View Collaboration

Approval Status

Collaboration Available

Event History

Collaboration Checked Out

Analyze Bids

Bid History

Search Results

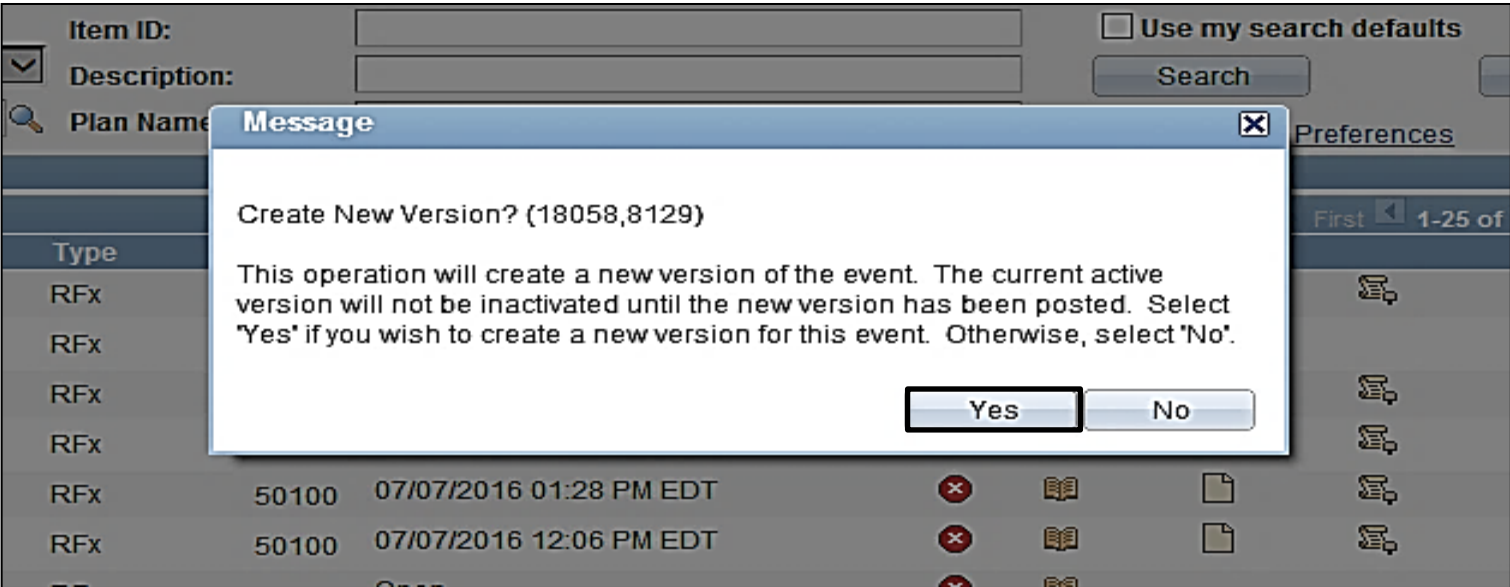
Find | View 100 | First | 1-25 of 118 | Last

| Event ID | Name | Format | Type | Unit | Status | | | | |
|------------|-----------------------|--------|------|-------|-----------------|--|--|--|--|
| 0000150073 | Event Template | Buy | RFx | 50100 | Open | | | | |
| 0000150047 | 02.PR.04.05 step17... | Buy | RFx | 50100 | Open | | | | |
| 0000150046 | Test 02.PR.04.06 | RFI | RFx | 50100 | RFI Completed | | | | |
| TNC | Terms and Conditio... | Buy | RFx | 50100 | Open | | | | |
| 0000150065 | TEST KA | Buy | RFx | 50100 | Event Completed | | | | |
| 0000150064 | SS TEST | Buy | RFx | 50100 | Open | | | | |
| 0000150063 | SOLE SOURCE REST 1... | Buy | RFx | 50100 | Open | | | | |
| 0000150061 | 01PR0402F | Buy | RFx | 50100 | Event Completed | | | | |
| 0000150060 | 01PR0402F | Buy | RFx | 50100 | Event Completed | | | | |



Change an Event- Versions (continued)

When you select the **Create a New Version** icon, a pop-up message appears to confirm creation of a new version. Select **Yes** to create the new version. The **Event Summary** page will be displayed.





Change an Event- Versions (continued)

Versions are generally used to allow bid tabulation staff to open and close events in order to enter bidders and bid responses.

From the **Event Summary** page, you may make modifications to the new version of the event. Refer to Lesson 2 for details on inviting bidders (Step 3) and Lesson 4 for details on adding bids.

Update the **End Date** to a date and time that will provide you with enough time to enter all your bidders and bids.

| | | | |
|------------------------|--|-----------|------------|
| Modify an Event | | | |
| Event Summary | | | |
| Business Unit: | 50100 | Event ID: | 0000153492 |
| Round: | 1 | Version: | 2 |
| Event Format: | Buy | | |
| Event Type: | RFx Change to Auction | | |
| Event Status: | Open | | |
| *Solicitation Type : | Request for Proposal <input type="button" value="v"/> | | |
| *Event Name: | Award by Line #2 | | |
| Description: | Award by Line #2 (bidders other than public) <input type="button" value="x"/> <input type="button" value="check"/> | | |
| Preview Date: | 06/13/2016 3:10PM EDT | | |
| *Start Date: | 06/27/2016 3:10PM EDT | | |
| *End Date: | 07/07/2016 3:10PM EDT | | |
| Copy From: | <input type="button" value="v"/> <input type="button" value="Go"/> | | |
| Preview By: | By Line <input type="button" value="v"/> | | |



Change an Event- Versions (continued)

Once bidders have been added to the new version, be sure to click the **Save Event** and **Post** buttons. Click **OK** on the pop-up message and your new version is automatically approved. Once the new version is posted, the previous version will be inactivated and the **Post** button will be grayed out.

Modify an Event
Event Summary

Business Unit: 50100 Event ID: 0000153492 Round: 1 Version: 2 Event Format: Buy

Event Type: RFx [Change to Auction](#)

Event Status: Open

Preview Date: 06/13/2016 3:10PM EDT

*Solicitation Type: Request for Proposal

*Start Date: 06/27/2016 3:10PM EDT

*Event Name: Award by Line #2

*End Date: 07/07/2016 3:10PM EDT

Description: Award by Line #2 (bidders other than public)

Copy From: Go

Preview By: By Line

Required fields reside on pages marked with an asterisk (*) – you may not save your event until all required fields are filled.

Step 1: Define Event Basics
Enter basic information, general settings and optional rules for this event.
[* Event Settings and Options](#)
[Event Comments and Attachments](#)
[Event Header Bid Factors](#)
[Payment Terms and Contact Info](#)
[Event Constraints](#)

Step 2: Configure Line Items
Create line listings for this event.
[* Line Items](#)
[Item Line Defaults](#)

Step 3: Select Bidders to Invite
Send out targeted invitations to this event, designate it as a public event, or both.
[* Bidder Invitations](#)

Step 4: Invite Collaborators
Invite others to collaborate on this event. You may not post your event while collaborators are reviewing it.
[Event Collaborators](#)

Step 5: Post Event
When all event creation activities are complete, click Post Event to release your event for scheduled external viewing and trigger any bidder invitations you may have defined.

Save Event

Post

Save As Template

Preview PDF

Message
This will submit the Event for Approval. (18058,207)
Once the event is approved and posted you will be limited to the changes that you can make to the event. Click OK to continue or Cancel if you are not done making changes to the event.

OK Cancel



Lesson 3: Summary

In this lesson, you learned:

- The **Event Workbench** page is used to maintain events.
- Multiversion events are created using the **Event Workbench** when you make changes (addendums) to a posted event.



Lesson 4: Create and Modify Bidder Responses

This lesson covers the following topics:

- Enter Bidder / Offeror Responses
- Edit Bid / Offeror Responses



Enter Bidder / Offeror Responses

eVA's web-based vendor registration and purchasing system allows state agencies, colleges, universities, and many local governments to use eVA to conduct all purchasing and sourcing activities for goods and services. A company or individual who wants to respond to a request for bid must register in eVA. Bidders / Offerors can view bidding opportunities on the eVA website.

Bidders / Offerors currently do not have access to Cardinal. Only Cardinal users with the Bid Processor role may enter bid responses into a strategic sourcing event. Upon posting the strategic sourcing event in Cardinal, the event is locked. The system allows for bid responses to be entered once the event's **Start Date** has passed and prior to its **End Date**. Generally, VDOT business processes require that bidders and bids be entered in the system after the event's **End Date**. Therefore, the Bid Processor must create a new version of the event with an extended **End Date** in order to open a window of time for bidder and bid response entry into Cardinal. The Bid Processor enters each bidder's response that is received on the paper bid / proposal.

If a bid tabulation error is made, Bid Processors may make corrections or edits as necessary. After all bids have been entered and the **End Date** has passed, bid responses may be viewed and analyzed.

Additional details on event statuses may be found in the appendix of this course.



Enter Bidder / Offeror Responses (continued)

To enter bids, go to the **Create Bidder Response** page using the following navigation path:

Main Menu > Sourcing > Event Responses > Create Bidder Response

Enter search criteria for the event you want to enter bids on. Click **Search**. The event and invited bidders are displayed. To select a bidder, click on the **Event ID** hyperlink on the row where the bidder's name is displayed.

Home

Favorites | Main Menu > Sourcing > Event Responses > Create Bidder Response

New Window

Create Bidder Response

Use Saved Search: Save Delete Clear

Search Criteria

*Business Unit:

Event ID:

Event Format:

Event Type:

Event Name:

Bidder Type:

Bidder Setid:

Bidder ID:

Name:

Contact Name:

Search

Search Results

Customize | Find | First 1 of 1 Last

| Event ID | Event Name | Round | Version | Name | Bidder Type | Setid | Bidder ID | Location |
|----------------------------------|---|-------|---------|---------------------------------|-------------|-------|------------|----------|
| 50100-0000153402 | Salem Storm Water Management Facilities | 1 | 1 | LAS TRUCKING & CONSTRUCTION INC | Vendor | STATE | 0000021103 | MAIN |



Enter Bidder / Offeror Responses (continued)

Home

Favorites | Main Menu > Sourcing > Event Responses > Create Bidder Response

New Window

Create Bidder Response

Use Saved Search: Save Delete Clear

Search Criteria

*Business Unit:

Event ID:

Event Format:

Event Type:

Event Name:

Bidder Type:

Bidder Setid:

Bidder ID:

Name:

Contact Name:

Search

Search Results

Customize | Find | | First 1 of 1 Last

| Event ID▼ | Event Name | Round | Version | Name | Bidder Type | Setid | Bidder ID | Location |
|----------------------------------|---|-------|---------|---------------------------------|-------------|-------|------------|----------|
| 50100-0000153402 | Salem Storm Water Management Facilities | 1 | 1 | LAS TRUCKING & CONSTRUCTION INC | Vendor | STATE | 0000021103 | MAIN |



Enter Bidder / Offeror Responses (continued)

The **Enter Bid on Behalf of** (Bidder / Vendor) page is displayed for the Bidder you selected. Click on the **Enter a New Bid** button.

Enter Bid on Behalf of Ivan Tolbert

Bidder Setid: STATE Bidder ID: 0000001700 Bidder Location: MAIN

Event Details

Customize | First 1-4 of 4 Last

| Business Unit | Event ID | Event Round | Event Version | Line Number | Item Description |
|---------------|------------|-------------|---------------|-------------|--|
| 50100 | 0000153496 | 1 | 1 | 1 | ABRASIVES, PLASTONE ABRASIVES, PLASTONE |
| 50100 | 0000153496 | 1 | 1 | 2 | ABRASIVES, PLASTONE 1 IN. X 50 YDS. ROLL, 320 GRIT |
| 50100 | 0000153496 | 1 | 1 | 3 | ABRASIVES, PLASTONE 1-1/2 IN. W, 30 FT. ROLL, 120 GRIT |
| 50100 | 0000153496 | 1 | 1 | 4 | Abrasive Plaston Rolls |

Enter a New Bid

Download XML Bid Packet

Accept Invitation

Decline Invitation

Click Accept Invitation if you intend to respond to this RFx at a later time.

Click Decline Invitation if you do not intend to respond to this RFx


[Return to Create Bidder Response](#)



Enter Bidder / Offeror Responses (continued)

A pop-up will appear asking if you would like to use the requested line quantity from the event to be equal to your bid quantity. Click **Yes**. You may modify the bid quantities on the **Event Details** page if needed.

The **Event Details** page will be displayed and you can enter the bid details.



Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > Sourcing > Event Responses > Create Bidder Response

New Window ? Help http

Default the bid quantity for each line item to be equal to the requested quantity? (18058,4118)

Select 'Yes' if you would like to have the bid quantity for auction line items defaulted for you. You will be allowed to change the line item bid quantity at any point prior to submitting your bid. Select 'No' if you do not wish to have the bid quantity defaulted.

One important note: If you select to default the bid quantity, only non-group lines will be impacted by this option. This is because responses for individual line items must be complete before bids can be placed for any line groups.

Yes

No



Enter Bidder / Offeror Responses (continued)

The **Event Details** page identifies the required responses, to include bid factors and the amount of lines and groups, if applicable.

On the **Event Details** page, scroll down to the **Step 1 – Enter Line Bid Responses** section.

Enter **Your Bid Quantity** and **Your Unit Bid Price**.

Click **Validate Entries** to check for errors. **Validate Entries** is available on many pages.

If there are no groups on this event and all the bid information has been entered, click **Submit Bid**.

Event Details

User: Cheryl H. (VDOT) Adams

Submit Bid

Save for Later

Validate Entries

Event Name:

Martin-Cheryl

Bidding Instructions

Event ID:

50100-0000153485

Bid ID:

New

Event Format/Type:

Sell Event

RFX

Bid Date:

Event Round:

1

Bid Currency:

USD

US Dollar

Event Version:

2

Event Start Date:

06/23/2016 11:16AM EDT

Event End Date:

2 hrs, 29 mins, 27 secs

View/Add General Comments and Attachments

Display Additional Event Info

Step 1: Enter Line Bid Responses

This event contains one or more individual lines that await your bid response. Some or all lines may require your bid in order for consideration by the Event Administrator.

Lines in This Event:

3

Lines Responded To:

0

Your Total Line Pricing:

0.0000 USD

Hide Line Detail

★ Bid Required

Line Comments/Files

Customize | First Previous Lines 1-3 of 3 Next Lines

| Line | Description | Unit | Requested Quantity | Your Bid Quantity | Unit Start Price | Your Current Price | Your Unit Bid Price | No Bid | Your Total Bid Price | | |
|------|--|------|--------------------|-------------------|------------------|--------------------|---------------------|--------------------------|----------------------|-----|--|
| 1 | ABRASIVES, PLASTONE ABRASIVES, PLASTONE | EA | 10.0000 | 10.0000 | | | | <input type="checkbox"/> | 0.0000 USD | Bid | |
| 2 | ABRASIVES, PLASTONE 1 IN. X 50 YDS. ROLL, 320 GRIT | RO | 20000.0000 | 20000.0000 | | | | <input type="checkbox"/> | 0.0000 USD | Bid | |
| 3 | ABRASIVES, PLASTONE 1-1/2 IN. W, 30 FT. ROLL, 120 GRIT | RO | 50000.0000 | 50000.0000 | | | | <input type="checkbox"/> | 0.0000 USD | Bid | |

At any point in the bid response process you may save an in-progress bid and resume completion at later time. When your bid response is complete, submit for consideration.

Submit Bid

Save for Later

Validate Entries



Enter Bidder / Offeror Responses (continued)

If **Line Groups** are included on the event, scroll down to **Step 2: Enter Line Group Bid Responses**. Click the **Display Group Detail** hyperlink to bid on the group(s). The **Groups** section will display. Enter the **Your Bid Quantity** equal to 1. Click on the **Bid** hyperlink. The **Group Details** page will be displayed.

Step 1: Enter Line Bid Responses

This event contains one or more individual lines that await your bid response. Some or all lines may require your bid in order for consideration by the Event Administrator.

Lines in This Event: 3

Lines Responded To: 0

Your Total Line Pricing: 0.0000 USD

Hide Line Detail

| Line | Description | Unit | Requested Quantity | Your Bid Quantity | Unit Start Price | Your Current Price | Your Unit Bid Price | Your Total Bid Price | No Bid | |
|------|---|------|--------------------|----------------------|------------------|--------------------|----------------------|----------------------|--------------------------|---------------------|
| 1 | ABRASIVES, PLASTONE ABRASIVES, PLASTONE | EA | 5.0000 | <input type="text"/> | | | <input type="text"/> | 0.0000 USD | <input type="checkbox"/> | Bid |
| 2 | ABRASIVES, PLASTONE 1 IN. X 50 YDS. ROLL, 320 GRIT | RO | 1.0000 | <input type="text"/> | | | <input type="text"/> | 0.0000 USD | <input type="checkbox"/> | Bid |
| 3 | ABRASIVES, PLASTONE 1- 1/2 IN. W. 30 FT. ROLL, 120 GRIT | RO | 1.0000 | <input type="text"/> | | | <input type="text"/> | 0.0000 USD | <input type="checkbox"/> | Bid |

Step 2: Enter Line Group Bid Response

Lines may have been grouped to satisfy a specific requirement. If you have already entered individual line responses, you are ready to consider if you can offer more favorable terms for lines awarded in groups.

Line Groups in This Event: 1

Groups Responded To: 0

[Display Group Detail](#)

At any point in the bid response process you may save an in-progress bid and return to it later for consideration.

Submit Bid

Save for Later

[Return to Create Bidder Response](#)

Step 2: Enter Line Group Bid Response

Lines may have been grouped to satisfy a specific requirement. If you have already entered individual line responses, you are ready to consider if you can offer more favorable terms for lines awarded in groups.

Line Groups in This Event: 1

Groups Responded To: 0

[Hide Group Detail](#)

| Line | Description | Unit | Requested Quantity | Your Bid Quantity | Unit Start Price | Your Current Price | Your Unit Bid Price | Your Total Bid Price | No Bid | |
|------|------------------------|------|--------------------|----------------------|------------------|--------------------|----------------------|----------------------|--------------------------|---------------------|
| 4 | Abrasive Plaston Rolls | EA | 1.0000 | <input type="text"/> | | | <input type="text"/> | 0.0000 USD | <input type="checkbox"/> | Bid |



Enter Bidder / Offeror Responses (continued)

Step 1: Enter Line Bid Responses

This event contains one or more individual lines that await your bid response. Some or all lines may require your bid in order for consideration by the Event Administrator.

Lines in This Event: 3

Lines Responded To: 0

Your Total Line Pricing: 0.0000 USD

[Hide Line Detail](#)

| Line | Description | Unit | Requested Quantity | Your Bid Quantity | Unit Start Price | Your Current Price | Your Unit Bid Price | Your Total Bid Price | No Bid | |
|------|---|------|--------------------|----------------------|------------------|--------------------|----------------------|----------------------|--------------------------|---------------------|
| 1 | ABRASIVES, PLASTONE ABRASIVES, PLASTONE | EA | 5.0000 | <input type="text"/> | | | <input type="text"/> | 0.0000 USD | <input type="checkbox"/> | Bid |
| 2 | ABRASIVES, PLASTONE 1 IN. X 50 YDS. ROLL, 320 GRIT | RO | 1.0000 | <input type="text"/> | | | <input type="text"/> | 0.0000 USD | <input type="checkbox"/> | Bid |
| 3 | ABRASIVES, PLASTONE 1- 1/2 IN. W, 30 FT. ROLL, 120 GRIT | RO | 1.0000 | <input type="text"/> | | | <input type="text"/> | 0.0000 USD | <input type="checkbox"/> | Bid |

Step 2: Enter Line Group Bid Response

Lines may have been grouped to satisfy a specific requirement. If you have already entered individual line responses, you are ready to consider if you can offer more favorable terms for lines awarded in groups.

Line Groups in This Event: 1 Groups Responded To: 0 [Display Group Detail](#)

At any point in the bid response process you may save an in-progress bid and resume completion at a later time. When your bid response is complete, submit it for consideration.

Submit Bid

Step 2: Enter Line Group Bid Response

Return to Create Bid

Lines may have been grouped to satisfy a specific requirement. If you have already entered individual line responses, you are ready to consider if you can offer more favorable terms for lines awarded in groups.

Line Groups in This Event: 1 Groups Responded To: 0 [Hide Group Detail](#)

| Line | Description | Unit | Requested Quantity | Your Bid Quantity | Unit Start Price | Your Current Price | Your Unit Bid Price | Your Total Bid Price | No Bid | |
|------|------------------------|------|--------------------|----------------------|------------------|--------------------|----------------------|----------------------|--------------------------|---------------------|
| 4 | Abrasive Plaston Rolls | EA | 1.0000 | <input type="text"/> | | | <input type="text"/> | 0.0000 USD | <input type="checkbox"/> | Bid |



Enter Bidder / Offeror Responses (continued)

On the **Group Details** page, the values automatically populate and total.

The sum of each unit price is combined. Prices are not extended.

Click on the **Start Page** button to return to the **Event Details** page.

FavoritesMain Menu > Sourcing > Event Responses > Create Bidder Response

Group Details

Save for LaterStart PageValidate Entries

Group: 1 of 1

Group Details

Item Description:

Group 1

Response Required:

No

☐ No Bid

[View/Add Question Comments and Attachments](#)

Unit of Measure:

Each

Your Unit Bid Price:

5.000000

Qty Requested:

1.0000

Your Current Price:

5.000000

Your Max Bid Quantity:

1.0000

Bid Increment:

Total Bid Price:

5.0000 USD

Reserve Price:

No

Group Members

CustomizeFindFirst1-2 of 2Last

| Line Number | Description | UOM | Group Quantity | Start Price | Your Unit Bid Price | Bid Quantity for Group |
|-------------|--|-----|----------------|-------------|---------------------|------------------------|
| 1 | ABRASIVES, PLASTONE 1 IN. X 50 YDS. ROLL, 320 GRIT | RO | 1.0000 | 0.010000 | 2.000000 | 1.0000 |
| 2 | ABRASIVES, PLASTONE 1-1/2 IN. W, 30 FT. ROLL, 120 GRIT | RO | 1.0000 | 0.010000 | 3.000000 | 1.0000 |

Total Detail Price: 5.0000 USD

Save for LaterStart PageValidate Entries

Group: 1 of 1



Enter Bidder / Offeror Responses (continued)

Repeat the previous steps for each group on the event.

When bids for all lines and groups have been entered, and entries are error free, click **Submit Bid**.

The **Bid Confirmation** page will display.

FavoritesMain Menu > Sourcing > Event Responses > Create Bidder Response

Event Version:1

Event Start Date:06/23/2016 12:50PM EDT

Event End Date:Event Completed

[View/Add General Comments and Attachments](#)

[Display Additional Event Info](#)

Step 1: Enter Line Bid Responses

This event contains one or more individual lines that await your bid response. Some or all lines may require your bid in order for consideration by the Event Administrator.

Lines in This Event:2

Lines Responded To:2

Your Total Line Pricing:22.0000 USD

[Hide Line Detail](#)

| Line | Description | Unit | Requested Quantity | Your Bid Quantity | Unit Start Price | Your Current Price | Your Unit Bid Price | Your Total Bid Price | No Bid | |
|------|---|------|--------------------|-------------------------------------|------------------|--------------------|---------------------------------------|----------------------|--------------------------|---------------------|
| 1 | ABRASIVES, PLASTONE 1 IN. X 50 YDS. ROLL, 320 GRIT | RO | 5.0000 | <input type="text" value="5.0000"/> | | 2.000000 | <input type="text" value="2.000000"/> | 10.0000 USD | <input type="checkbox"/> | Bid |
| 2 | ABRASIVES, PLASTONE 1- 1/2 IN. W, 30 FT. ROLL, 120 GRIT | RO | 4.0000 | <input type="text" value="4.0000"/> | | 3.000000 | <input type="text" value="3.000000"/> | 12.0000 USD | <input type="checkbox"/> | Bid |

Step 2: Enter Line Group Bid Response

Lines may have been grouped to satisfy a specific requirement. If you have already entered individual line responses, you are ready to consider if you can offer more favorable terms for lines awarded in groups.

Line Groups in This Event:1

Groups Responded To:1

[Hide Group Detail](#)

| Line | Description | Unit | Requested Quantity | Your Bid Quantity | Unit Start Price | Your Current Price | Your Unit Bid Price | Your Total Bid Price | No Bid | |
|------|-------------|------|--------------------|-------------------------------------|------------------|--------------------|---------------------------------------|----------------------|--------------------------|---------------------|
| 3 | Group 1 | EA | 1.0000 | <input type="text" value="1.0000"/> | | 5.000000 | <input type="text" value="5.000000"/> | 5.0000 USD | <input type="checkbox"/> | Bid |

At any point in the bid response process you may save an in-progress bid and resume completion at later time. When your bid response is complete, submit for consideration.



Enter Bidder / Offeror Responses (continued)

On the **Bid Confirmation** page, review the details of the bid and click **OK** to confirm the bid. The **Create Bidder Response** page is displayed and you can continue to enter bid responses for remaining bidders by repeating the previous steps.



FavoritesMain Menu > Sourcing > Event Responses > Create Bidder Response

Bid Confirmation

Your bid has been successfully submitted.

| | | | | |
|--------------------------|------------------------|------------------|--------------------------|-------------------|
| Bid ID: | 1 | Bid Date: | 06/23/2016 1:11:52PM EDT | |
| Event ID: | 0000153500 | Grouped Event | | |
| Event Format: | Sell Event | Round: | 1 | Version: 1 |
| Start Date: | 06/23/2016 12:50PM EDT | End Date: | Event Completed | |
| Your Total Price: | 22.00 USD | | | |

OK



Edit Bidder / Offeror Responses

If a bid tabulation error is made, bid tabulators may make corrections or edits as necessary. After all bids have been entered and the closing date/time has passed, bid responses may be viewed, updated, and analyzed.

In order to be able to change bid responses, the **Allow Edit of Posted Bids** must be checked on the **Event Settings and Options** page for the event.

CARDINAL

Favorites | Main Menu > Sourcing > Create Events > Event Details

Create an Event

Event Settings and Options

Business Unit: 50100 Event ID: NEXT Round: 1 Version: 1 Event Format: Buy Event Type: RFx

☐ Allow Bidder XML Downloads

☐ Bid Required On All Lines

☐ Multiple Bids Allowed

☒ Allow Edit of Posted Bids

Round\Version Display: Display Round and Version

☒ Sealed Event

☐ Display Bid Factor Weightings

Factor Event Score Into: Total Score

Header Weighting: 100.00000

Line Factor Weighting:

Start Price: Do Not Display

☐ Bidders May Create Line Groups

☐ Allow Price Breaks with Groups

► Associated Categories

Save Event Changes

GoTo: Go



Edit Bidder / Offeror Responses (continued)

The process to change a bid response is similar to the process you used to create the bid response. Navigate to the **Create Bidder Response** page using the following path:

Main Menu > Sourcing > Event Responses > Create Bidder Response

Enter search criteria, or **Event ID**, for the event that the bid you wish to change is associated to. Click **Search**. The event and invited bidders are displayed. To select a bidder, click on the **Event ID** hyperlink on the row where the bidder's name is displayed.

Home

FavoritesMain Menu > Sourcing > Event Responses > Create Bidder ResponseNew Window

Create Bidder Response

Use Saved Search: [dropdown] [Save] [Delete] [Clear]

Search Criteria

*Business Unit: [50100]

Event ID: [%153442]

Event Format: [dropdown]

Event Type: [dropdown]

Event Name: [text]

Bidder Type: [dropdown]

Bidder Setid: [text]

Bidder ID: [text]

Name: [text]

Contact Name: [text]

[Search]

Search Results

CustomizeFindFirst1-5 of 5Last

| Event ID | Event Name | Round | Version | Name | Bidder Type | Setid | Bidder ID | Location |
|----------------------------------|------------|-------|---------|-------------------------------|-------------|-------|------------|----------|
| 50100-0000153442 | Stone | 1 | 2 | Walker Sand & Stone Inc | Vendor | STATE | 0000024930 | MAIN |
| 50100-0000153442 | Stone | 1 | 2 | Luck Stone Corp | Vendor | STATE | 0000031033 | MAIN |
| 50100-0000153442 | Stone | 1 | 2 | LL Carter & Son Inc | Vendor | STATE | 0000033093 | MAIN |
| 50100-0000153442 | Stone | 1 | 2 | D W CARY HAULING INC | Vendor | STATE | 0000018339 | MAIN |
| 50100-0000153442 | Stone | 1 | 2 | Vulcan Construction Materials | Vendor | STATE | 0000009329 | MAIN |



Edit Bidder / Offeror Responses (continued)

The **Enter Bid on Behalf of** (Bidder / Customer / Vendor) page is displayed for the Bidder you selected.

The **Bids** section of the page lists all the bids for your bidder for the selected event. Click on the **View/Edit** icon to modify the bid.

Favorites

Main Menu

Sourcing

Event Responses

Create Bidder Response

Enter Bid on Behalf of Walker Sand & Stone Inc

Bidder Setid: STATE

Bidder ID: 0000024930

Bidder Location: MAIN

Event Details

Customize

First

1-46 of 46

Last

| Business Unit | Event ID | Event Round | Event Version | Line Number | Item Description |
|---------------|------------|-------------|---------------|-------------|--|
| 50100 | 0000153442 | 1 | 2 | 1 | AGGREGATE BASE, STONE CLASS I, DRY RIP RAP |
| 50100 | 0000153442 | 1 | 2 | 2 | STONE NO. 68, STONE |
| 50100 | 0000153442 | 1 | 2 | 3 | STONE, CRUSHED GRADE 26 |
| 50100 | 0000153442 | 1 | 2 | 4 | STONE NO. 8, STONE |
| 50100 | 0000153442 | 1 | 2 | 5 | STONE NO. 5, STONE |
| 50100 | 0000153442 | 1 | 2 | 6 | STONE RIP RAP CLASS AI |
| 50100 | 0000153442 | 1 | 2 | 7 | STONE NO. 3, STONE |
| 50100 | 0000153442 | 1 | 2 | 8 | AGGREGATE BASE, STONE CLASS I, DRY RIP RAP |
| 50100 | 0000153442 | 1 | 2 | 9 | STONE NO. 1, STONE |
| 50100 | 0000153442 | 1 | 2 | 10 | STONE, CRUSHED GRADE 26 |
| 50100 | 0000153442 | 1 | 2 | 11 | STONE NO. 8, STONE |
| 50100 | 0000153442 | 1 | 2 | 12 | STONE NO. 3, STONE |
| 50100 | 0000153442 | 1 | 2 | 13 | STONE NO. 5, STONE |
| 50100 | 0000153442 | 1 | 2 | 14 | STONE RIP RAP CLASS AI |
| 50100 | 0000153442 | 1 | 2 | 15 | STONE NO. 68, STONE |

Download XML Bid Packet

Legend

Cancel Bid

Edit/View existing Bid

Upload Bid

Bids

Customize

First

1 of 1

Last

| Business Unit | Event ID | Event Round | Event Version | Bid ID | | Date Time Last Saved |
|---------------|------------|-------------|---------------|--------|--|------------------------|
| 50100 | 0000153442 | 1 | 2 | 1 | | 05/06/2016 12:20PM EDT |

Return to Create Bidder Response



Edit Bidder / Offeror Responses (continued)

The **Events Details** page is displayed for the event and Bidder you selected.

The previously entered bid is displayed and available for edit.

Once you have entered all your changes, click **Submit Bid**.

FavoritesMain MenuSourcingEvent ResponsesCreate Bidder Response

Welcome, Cheryl H. (VDOT) Adams
User: Cheryl H. (VDOT) Adams

Submit BidSave for Later

Validate Entries

Event Name:Stone

Event ID:50100-0000153442

Event Format/Type:Sell EventRFx

Event Round:1

Event Version:2

Event Start Date:06/23/2016 12:30PM EDT

Event End Date:Event Completed

Bidding Instructions

Bid ID:1

Bid Date:05/06/2016 12:20:39PM EDT

Bid Currency:USDUS Dollar

View/Add General Comments and Attachments

Display Additional Event Info

Step 1: Enter Line Bid Responses

This event contains one or more individual lines that await your bid response. Some or all lines may require your bid in order for consideration by the Event Administrator.

Lines in This Event:46

Lines Responded To:46

Your Total Line Pricing:838,443.9500 USD

Hide Line Detail

★ Bid Required

Line Comments/Files

Lines

CustomizeFirst Previous Lines 1-20 of 46 Next Lines

| Line | Description | Unit | Requested Quantity | Your Bid Quantity | Unit Start Price | Your Current Price | Your Unit Bid Price | No Bid | Your Total Bid Price | | |
|------|--|------|--------------------|-------------------|------------------|--------------------|---------------------|--------------------------|----------------------|-----|--|
| 1 | AGGREGATE BASE, STONE CLASS I, DRY RIP RAP | LTN | 400.0000 | 400.0000 | | 46.450000 | 46.450000 | <input type="checkbox"/> | 18,580.0000 USD | Bid | |
| 2 | STONE NO. 68, STONE | LTN | 300.0000 | 300.0000 | | 28.750000 | 28.750000 | <input type="checkbox"/> | 8,625.0000 USD | Bid | |
| 3 | STONE, CRUSHED GRADE 26 | LTN | 3000.0000 | 3000.0000 | | 22.500000 | 22.500000 | <input type="checkbox"/> | 67,500.0000 USD | Bid | |
| 4 | STONE NO. 8, STONE | LTN | 1000.0000 | 1000.0000 | | 30.490000 | 30.490000 | <input type="checkbox"/> | 30,490.0000 USD | Bid | |
| 5 | STONE NO. 5, STONE | LTN | 300.0000 | 300.0000 | | 28.270000 | 28.270000 | <input type="checkbox"/> | 8,481.0000 USD | Bid | |
| 6 | STONE RIP RAP CLASS A1 | LTN | 500.0000 | 500.0000 | | 45.000000 | 45.000000 | <input type="checkbox"/> | 22,500.0000 USD | Bid | |

At any point in the bid response process you may save an in-progress bid and resume completion at later time. When your bid response is complete, submit for consideration.

Submit BidSave for Later

Validate Entries

Return to Create Bidder Response



Edit Bidder / Offeror Responses (continued)

If the event status has changed to **Event Completed**, a pop-up message will display. Click **Yes**.

Message

Event Completed. Are you sure you want to enter a bid? (18058,359)

Yes

No

- On the **Bid Confirmation** page, review the details of the bid and click **OK** to confirm the bid. The **Create Bidder Response** page is displayed. The bid modification is complete.

CARDINAL

Favorites

Main Menu

Sourcing

Event Responses

Create Bidder Response

Bid Confirmation

Your bid has been successfully submitted.

Bid ID:

1

Event ID:

0000153442

Stone

Event Format:

Sell Event

Start Date:

06/23/2016 12:30PM EDT

Your Total Price:

833,798.95 USD

Bid Date:

06/23/2016 5:27:19PM EDT

Round:

1

Version:

2

End Date:

Event Completed

OK



Simulation: Entering Bidder / Offeror Responses

You are now about to view a simulation entitled **Entering Bidder / Offeror Responses**. Click the Cardinal logo below to start the simulation.





Lesson 4: Summary

In this lesson, you learned:

- How the Bid Processor uses the **Create Bidder Response** page to enter the bid / proposal information.
- How to edit previously entered bids.



Lesson 5: Analyze Bids / Proposals and Awarding Events

This lesson covers the following topics:

- Analyze Bid / Proposal Responses
- Collaborate on Bid / Proposal Responses (optional)
- Award and Post the Event (By Line, Group, or Grand Total)
- Create a Purchase Order / Contract
- Cancel a Purchase Order / Contract Associated to an Event



Analyze Bid / Proposal Responses

Once an event's end date has passed and all the bids have been entered, using the **Event Workbench** you can review the bids. Simply click on the **Analyze** icon next to the event with bids you wish to review. The **Analyze Total** page will display.

You can navigate to the **Event Workbench** page using the following path:

Main Menu > Sourcing > Maintain Events > Event Workbench

Event Workbench

Search Criteria

Event ID:

From Start Date:

To Start Date:

Sort With:

Created By:

From End Date:

To End Date:

Sort Order:

Event Format:

Category:

☐ Only show Events I created

Event Type:

Item ID:

☐ Use my search defaults

Event Status:

Collaborating Event

Description:

Search

Reset

Associated With Plan:

Plan Name:

Default Search Preferences

Legend

Pause

Resume

Cancel

Approval Status

Event History

Analyze Bids

Edit Event

New Version

View Collaboration

Collaboration Available

Collaboration Checked Out

Bid History

Search Results

Find | View All | First | 1-3 of 3 | Last

| Event ID | Name | Format | Type | Unit | Status | | | |
|------------|-----------------------|--------|------|-------|---------------------|--|--|--|
| 0000150090 | Stone, Delivered a... | Buy | RFx | 50100 | Collaborating Event | | | |
| 499 | Tree pruning/small... | Buy | RFx | 50100 | Collaborating Event | | | |
| 0000153486 | Helen's RFP | Buy | RFx | 50100 | Collaborating Event | | | |



Analyze Bid / Proposal Responses (continued)

From the **Analyze Total** page you can use the optional **Analyze Export** feature which allows you to export bid / proposal data to a spreadsheet.

On the **Go To** box drop-down menu, select **...Analyze Export**. The **Bid Analysis Export** page will be displayed.

Analyze Total

Analyze Total

[Analyze Line](#)

Business Unit:50100

Event ID:0000150762

Round:1

Version:3

Event Name:Training Sourcing Event

Event Format:Buy

Event Type:RFx

Currency:USD

End Date:01/22/2013 10:23AM EST

Status:Pending Award

Go To:

...

Bid Analysis and Display Options

Analysis

Bidder Name

SIS-USA inc

Land & Sea Inc

Event Version Responded To:

3

3

Bid Number:

1

1

Total Bid Amount:

3,230.0000

2,450.0000

Total Bid Cost

0.00

0.00

...Analyze Export

Associate Planning Task

Award Events

Create New Round

Document Status Inquiry

Event Attachments/Comments

Invite Collaborators

Review Optimization



Analyze Bid / Proposal Responses (continued)

On the **Bid Analysis Export** page, you can select to email the report to yourself and/or other(s).

- Click the **+ / -** icon to add / delete email recipients.
- In the **Filter Bids** section, choose the bids you wish to include in your export file.
- Click **Create Analysis Export**.

The **Analyze Events** page will be saved, and a process will be kicked off to create the **Bid Analysis Export file** and email the selected recipients.

Once the export has been kicked off, click the **Return to Analyze Event** hyperlink to return back to the **Analyze Total** page.

Bid Analysis Export

Business Unit: 50100 **Event ID:** 0000153402 **Round:** 1 **Version:** 1 **Event Name:** Salem Storm Water Management Facilities
Event Format: Buy **Event Type:** RFX **Currency:** USD **Finish:** 05/09/16 1:00PM EDT **Status:** Pending Award

Analysis Export File Recipients [Customize](#) First 1 of 1 Last

| | *Name | *Email Address | Notify | |
|---|--------------|--------------------------------|-------------------------------------|----------------|
| 1 | ARDMAN,HELEN | helen.ardman@vdot.virginia.gov | <input checked="" type="checkbox"/> | <div>+ -</div> |

Filter Bids
Select the bids you want to include in your Analysis Export file.

Select All Deselect All

☒ Award ☒ Counter ☒ Disallow ☒ Reject ☒ <No Action>
☒ Display Disqualified Bids ☒ Display Withdrawn Bids

Filter Bid Responses
☐ Display Delta Responses

Create Analysis Export

[Return to Analyze Event](#)

To create a bid analysis export:

1. Enter the email addresses of those you would like to receive the export.
2. Click on the Create Analysis Export button. At this point the Analyze Events pages will be saved, and a process will be kicked off to create the Bid Analysis Export file and email the recipients listed above.
3. Once the email is received, open the XML attachment in Microsoft Excel.



Analyze Bid / Proposal Responses (continued)

Bid Analysis Export

| | | | | | |
|-----------------------|--------------------|------------------|---------------------|---|--|
| Business Unit: | Event ID: | Round: | Version: | Event Name: | |
| 50100 | 0000153402 | 1 | 1 | Salem Storm Water Management Facilities | |
| Event Format: | Event Type: | Currency: | Finish: | Status: | |
| Buy | RFx | USD | 05/09/16 1:00PM EDT | Pending Award | |

| Analysis Export File Recipients | | | | | Customize | First | 1 of 1 | Last | |
|---------------------------------|--------------|--|--------------------------------|--|-------------------------------------|-------|--------|------|--|
| | *Name | | *Email Address | | Notify | | | | |
| 1 | ARDMAN,HELEN | | helen.ardman@vdot.virginia.gov | | <input checked="" type="checkbox"/> | | | | |

Filter Bids

Select the bids you want to include in your Analysis Export file.

☒ Award ☒ Counter ☒ Disallow ☒ Reject ☒ <No Action>

☒ Display Disqualified Bids ☒ Display Withdrawn Bids

Filter Bid Responses

☐ Display Delta Responses

[Return to Analyze Event](#)



- To create a bid analysis export:
1. Enter the email addresses of those you would like to receive the export.
 2. Click on the Create Analysis Export button. At this point the Analyze Events pages will be saved, and a process will be kicked off to create the Bid Analysis Export file and email the recipients listed above.
 3. Once the email is received, open the XML attachment in Microsoft Excel.



Analyze Bid / Proposal Responses (continued)

The **Event Analysis** export report is delivered to each recipient's email. The example below shows two bidders at the bottom right with the **Bidder Name** and **Total Bid Amount**.

| Event Analysis | | | | | | | | | | | | | | | | | | | | | | |
|---|----------------|-------------------------|--------------|----------------|---------------------|----------------|-------------|-----------------------|---|---|--------------------|---|---|--------------------------|------|------|---------------------------|---|---|-------------------------|--|--|
| PeopleSoft Strategic Sourcing | | | | | | | | | | | | | | | | | | | | | | |
| Event ID | Format | Type | Round | Version | | | | | | | | | | | | | | | | | | |
| 50100-0000150762 | Buy | RFx | 1 | 3 | | | | | | | | | | | | | | | | | | |
| Event Name | | | | | | | | | | | | | | | | | | | | | | |
| Training Sourcing Event | | | | | | | | | | | | | | | | | | | | | | |
| Start Time | | Finish Time | | | | | | | | | | | | | | | | | | | | |
| 01/22/2013 10:22 AM EDT | | 01/22/2013 10:23 AM EDT | | | | | | | | | | | | | | | | | | | | |
| Event Description | | | | | | | | | | | | | | | | | | | | | | |
| I. PURPOSE: | | | | | | | | | | | | | | | | | | | | | | |
| The Virginia Department of Transportation herein referred to as "VDOT" is soliciting bids from interested firms to perform planned (by the route) and unplanned/on-call (site specific) tree pruning services, in accordance of the performance specifications herein, within the "Name" District along the right-of-way on the listed routes within "Name(s)" Counties. | | | | | | | | | | | | | | | | | | | | | | |
| PERIOD OF CONTRACT: From _____ through _____ | | | | | | | | | | | | | | | | | | | | | | |
| Awards will be made on a Grand Total basis, per Lot: | | | | | | | | | | | | | | | | | | | | | | |
| NOTE: This is a requirements contract and the quantities listed in Attachment D and the within the pricing schedule are estimated. VDOT reserves the right to subtract routes to be pruned. The pruning of routes listed in Attachment D shall be performed on both sides of the route, unless otherwise identified. Refer to Attachment D for listed routes, estimated shoulder lengths, vertical clearance and horizontal clearance. Roadway shoulders may include up to 4 sides on divided highways. | | | | | | | | | | | | | | | | | | | | | | |
| Report Date: 01/22/2013 10:38 AM EDT | | | | | | | | | | | | | | | | | | | | | | |
| Event Currency: US Dollar | | | | | | | | | | | | | | | | | | | | | | |
| Bids Allowed in Other Currency: No | | | | | | | | | | | | | | | | | | | | | | |
| Factor General Score into Line Score: No | | | | | | | | | | | | | | | | | | | | | | |
| Included Bids: All | | | | | | | | | | | | | | | | | | | | | | |
| Highlight Delta Response: No | | | | | | | | | | | | | | | | | | | | | | |
| <table border="1"><tr><td>Bidder Name:</td><td>Land & Sea Inc</td><td>SIS-USA inc</td></tr><tr><td>Event Version:</td><td>3</td><td>3</td></tr><tr><td>Bid Number:</td><td>1</td><td>1</td></tr><tr><td>Total Bid Amount:</td><td>2450</td><td>3230</td></tr><tr><td>Total Event Score:</td><td>0</td><td>0</td></tr><tr><td>Award By Percent</td><td></td><td></td></tr></table> | | | | | Bidder Name: | Land & Sea Inc | SIS-USA inc | Event Version: | 3 | 3 | Bid Number: | 1 | 1 | Total Bid Amount: | 2450 | 3230 | Total Event Score: | 0 | 0 | Award By Percent | | |
| Bidder Name: | Land & Sea Inc | SIS-USA inc | | | | | | | | | | | | | | | | | | | | |
| Event Version: | 3 | 3 | | | | | | | | | | | | | | | | | | | | |
| Bid Number: | 1 | 1 | | | | | | | | | | | | | | | | | | | | |
| Total Bid Amount: | 2450 | 3230 | | | | | | | | | | | | | | | | | | | | |
| Total Event Score: | 0 | 0 | | | | | | | | | | | | | | | | | | | | |
| Award By Percent | | | | | | | | | | | | | | | | | | | | | | |



Analyze Bid / Proposal Responses (continued)

The **Event Analysis** below shows responses broken down by Bidder. Each response is scored based upon the weightings in the original event.

PeopleSoft Strategic Sourcing

Event ID

50100-0000150762

Format

Buy

Type

RFX

Round

1

Version

3

Event Name

Training Sourcing Event

Start Time

01/22/2013 10:22 AM EDT

Finish Time

01/22/2013 10:23 AM EDT

Report Date: 01/22/2013 10:38 AM EDT

Event Currency: US Dollar

Bids Allowed in Other Currency: No

Factor General Score into Line Score: No

Included Bids: All

Highlight Delta Response: No

Line Details

Line: 1

Item ID: 9888878811

Line Quantity: 150

Weighting: 0.00%

Bid Required: Yes

Reserve Price: No

Description: TREE TRIMMING AND BRUSH REMOVAL, PER VADOT SPECIFICATIONS GREATER THAN 6 IN. <= 12 IN. (DBH) TREE REMOVAL

Price Details

What is your bid price?

265

Worst

Weighting

100.00%

Quantity Details

Minimum Quantity:

0

Unit of Measure:

EA

Requested

Bidder Name: Land & Sea Inc

Event Version: 3

Bid Number: 1

SIS-USA inc

3

1

Line Bid Quantity:

150

150

Total Line Bid Amount:

150

300

Total Line Score:

100

99.62

Unit Bid Price:

1

2

Score:

100

99.62

Minimum Quantity:

0

0

Bid Unit of Measure:

EA

EA

Conversion Rate:

N/A

N/A

Award By Percent

Award Quantity

83



Collaborate on Bid / Proposal Responses

Use the optional **Invite Collaborators** feature to send bid / proposal responses to specific collaborators' worklists for view and comment. You can invite any users with the role of Event Collaborator to contribute to event creation or analysis. During bid analysis, Collaborators can manually score text-based bid factors (i.e. a question requiring a text answer), enter responses to hidden bid factors, and change bid factor weightings. The system calculates an average score across all collaborators.

Navigate to the **Event Collaboration Details** page using the following path:

Main Menu > Sourcing > Maintain Events > Analyze Events

- Enter the event search criteria.
- Select the event you wish to collaborate on. The **Analyze Total** page will display.
- Click on the **Go To** box drop-down arrow and select **Invite Collaborators**. The **Event Collaboration Details** page will be displayed.

Analyze Events

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Maximum number of rows to return (up to 300): 300

Business Unit: [v] 50100

Event ID: [v] begins with [v] 0000

Event Round: [v]

Event Version: [v] 1

Analyze Total

| Business Unit | Event ID | Round | Version | Event Name |
|---------------|------------|-------|---------|-----------------------|
| 50100 | 0000153496 | 1 | 1 | Helen Again and AGain |

Event Format: Buy Event Type: RFx Currency: USD End Date: 06/16/2016 9:45AM EDT Status: Pending Award

Bid Analysis and Display Options

Analysis

| Bidder Name | | | | |
|----------------|------|------|------|--|
| | 0.00 | 0.00 | 0.00 | |
| Business 50100 | 0.00 | 0.00 | 0.00 | |

Hide Bid

Unhide Bids

<< < > >>

Save Return to Search Previous in List Next in List

Analyze Total | Analyze Line | Analyze Group

Go To: ...Analyze Export, Associate Planning Task, Award Events, Create New Round, Document Status Inquiry, **Event Attachments/Comments**, **Invite Collaborators**, Review Optimization



Collaborate on Bid / Proposal Responses (continued)

Using the **Event Collaboration Details** page, set the **Collaboration Due Date**, the collaborators and the **Routing Sequence** the collaborators will review the event in. You may add or subtract collaborators using the **+ / -** icons.

The Buyer may also invite other collaborators. While collaborators are analyzing the event, Cardinal sets the event status to **Collaborating Bid Analysis**.

Event Collaboration Details

Collaboration Due Date:06/09/2016Time:5:41PM

Save As Group

Analysis Collab Due Date

Invited Collaborators

| Collaborator Opid | Name | Routing Sequence |
|-------------------|---------------------|------------------|
| ADAM.DIXON | Dixon, Adam (VDOT) | 1 |
| A.HETZER | Hetzer, Andy (VDOT) | 2 |

Find Collaborators

Show Bidders Name

Route To

OK

Cancel

For additional details on collaboration, please see the job aid titled **501 PR345: Strategic Sourcing Collaboration**.



Award and Post the Event

Once you have analyzed bids and made a selection, you will award the winning bid. You can award the winning bid / proposal by line, group, or total.

Award bids by:

- Line - use to award different lines to different vendors.
- Group - if you configured specific line items into groups that are to be awarded based on location, similar items, etc. in the **Configure Line Items** portion of your event.
- Total - if you want to award the entire bid / proposal to one bidder.

For additional information on awarding events, refer to the job aid titled **501 PR345: Strategic Sourcing – Bid Factors, Weights & Score / Event Awards**.



Award and Post the Event – By Line

Each line is separately considered and awarded on the **Analyze Line** page. Navigate to this page using the following path:

Main Menu > Sourcing > Maintain Events > Analyze Events

Search and select the event. The **Analyze Total** page will display. Click on the **Analyze Line** hyperlink. Next, click on the **Analyze** hyperlink next to the **Line** you wish to award. The **Analyze Line** page will display and details the extended bid response.

Analyze Line

[Analyze Total](#)

Analyze Line

Business Unit:
50100

Event ID:
0000153443

Round:
1

Version:
1

Event Name:
Stone

Event Format:
Buy

Event Type:
RFx

Currency:
USD

End Date:
05/06/2016 1:30PM EDT

Status:
Pending Award

Go To:
...

Line Items

Customize | Find | View 100 | First 1-10 of 1

| Line▲ | Item ID | Description | Category | UOM | Start Price | Requested Qty | Qty Awarded | Weighting▲ | Line Status | Analyze |
|-------|------------|------------------------|----------|-----|-------------|---------------|-------------|------------|-------------|---------|
| 1 | 7503532575 | STONE 8 P MIN. GRADE B | 7503532 | LTN | 18.53000 | 500.0000 | 0.0000 | 5.00000 | Open | Analyze |
| 2 | 7503532575 | STONE 8 P MIN. GRADE B | 7503532 | LTN | 18.53000 | 500.0000 | 0.0000 | 0.00000 | Open | Analyze |
| 3 | 7503532575 | STONE 8 P MIN. GRADE B | 7503532 | LTN | 20.37000 | 1,000.0000 | 0.0000 | 5.00000 | Open | Analyze |
| 4 | 7503532575 | STONE 8 P MIN. GRADE B | 7503532 | LTN | 21.73000 | 1,000.0000 | 0.0000 | 5.00000 | Open | Analyze |



Award and Post the Event – By Line (continued)

Expand the **Factors** section to view the per unit price bid for each Bidder. Make the award selection using the **Bid Action** drop-down. The award can also be split, by quantity or percent, between different Bidders. When finished, click **OK**.

Analyze Line

Business Unit: 50100

Event ID: 0000153443

Round: 1

Version: 1

Event Name: Stone

Event Format: Buy

Event Type: RFx

Currency: USD

End Date: 05/06/2016 1:30PM EDT

Status: Pending Award

Line: 1

Requested Quantity: 500.0000

UOM: LTN

Start Price:

Item ID: 7503532575

Item Description: STONE 8 P MIN. GRADE B

Weighting: 5.00000

Bid Analysis and Display Options

Analysis

| Bidder Name | TME Enterprises Inc | Jason Harvey | BOXLEY MATERIALS Co |
|----------------------|---------------------|--------------|---------------------|
| Event Version: | 1 | 1 | 1 |
| Bid Number: | 1 | 1 | 1 |
| Bid Quantity: | 500.0000 | 500.0000 | 500.0000 |
| Minimum Bid Quantity | 0.0000 | 0.0000 | 0.0000 |
| Total Bid Amount: | 9,180.0000 | 9,240.0000 | 11,120.0000 |
| Total Bid Cost: | 9,180.00 | 9,240.00 | 11,120.00 |
| Total Line Score: | 100.0000 | 96.9100 | 0.0000 |

Bid Action:

Award

NA

NA

Reject Reason Code:

Award by Percent:

100.000

Award Quantity:

500.0000

Hide Bid

☐

☐

☐

Factors

Add/Edit Bid Factors

| Weighting | UOM | Ideal | | |
|-------------------------|-----|-------|-------|-------|
| What is your bid price? | | | | |
| 100.00000 | 0 | 18.36 | 18.48 | 22.24 |

Recalculate

Unhide Bids

<<

<

>

>>

OK

Cancel

Apply



Award and Post the Event – By Line (continued)

Repeat the award steps for each line. Once the event awards are complete for each line, click **Save**. Navigate to the **Award Details** page using the **Go To** drop-down box, select **Award Events**.

Analyze Line

Analyze Line

Business Unit:50100

Event ID:0000153443

Event Format:Buy

Round:1

Event Type:RFx

Currency:USD

Version:1

End Date:05/06/2016 1:30PM EDT

Event Name:Stone

Status:Pending Award

Analyze Export

Associate Planning Task

Award Events

Create New Round

Document Status Inquiry

Event Attachments/Comments

Invite Collaborators

Review Optimization

| Line | Item ID | Description | Category | UOM | Start Price | Requested Qty | Qty Awarded | We | | |
|------|------------|--------------------------------------|----------|-----|-------------|---------------|-------------|---------|------|---------|
| 1 | 7503532575 | STONE 8 P MIN. GRADE B | 7503532 | LTN | 18.53000 | 500.0000 | 500.0000 | | | |
| 2 | 7503532575 | STONE 8 P MIN. GRADE B | 7503532 | LTN | 18.53000 | 500.0000 | 500.0000 | 0.00000 | Open | Analyze |
| 3 | 7503532575 | STONE 8 P MIN. GRADE B | 7503532 | LTN | 20.37000 | 1,000.0000 | 1,000.0000 | 5.00000 | Open | Analyze |
| 4 | 7503532575 | STONE 8 P MIN. GRADE B | 7503532 | LTN | 21.73000 | 1,000.0000 | 1,000.0000 | 5.00000 | Open | Analyze |
| 5 | 7503532575 | STONE 8 P MIN. GRADE B | 7503532 | LTN | 18.46000 | 2,500.0000 | 2,500.0000 | 5.00000 | Open | Analyze |
| 6 | 7503532575 | STONE 8 P MIN. GRADE B | 7503532 | LTN | 20.89000 | 500.0000 | 500.0000 | 5.00000 | Open | Analyze |
| 7 | 7503548440 | STONE, CRUSHED GRADE 9 CRUSHED STONE | 7503548 | LTN | 13.40000 | 500.0000 | 500.0000 | 5.00000 | Open | Analyze |
| 8 | 7503548440 | STONE, CRUSHED GRADE 9 CRUSHED STONE | 7503548 | LTN | 13.40000 | 500.0000 | 500.0000 | 0.00000 | Open | Analyze |
| 9 | 7503548440 | STONE, CRUSHED GRADE 9 CRUSHED STONE | 7503548 | LTN | 13.40000 | 500.0000 | 500.0000 | 0.00000 | Open | Analyze |
| 10 | 7503548440 | STONE, CRUSHED GRADE 9 CRUSHED STONE | 7503548 | LTN | 13.40000 | 500.0000 | 500.0000 | 0.00000 | Open | Analyze |

Save

Return to Search

Previous in List

Next in List

Analyze Total | Analyze Line



Award and Post the Event – By Line (continued)

From the **Award Details** page you may make the award to the PO or contract using the **Award Type** drop-down box. Click on the right and left arrows to scroll through the **Award Details** to review and update the **Award Type** for each bidder. The **PO Business Unit** and payment **Terms** must also be updated. When complete, click **Post Award**.

Award Details

[Award Details](#) [Award Summary](#) [Review Constraints](#)

Business Unit: 50100 **Event ID:** 0000153443 **Round:** 1 **Version:** 1 **Event Name:** Stone

Event Format: Buy **Event Type:** RFx **Currency:** USD **End Date:** 05/06/2016 1:30PM EDT **Status:** Pending Award **Go To:**

☐ Display bids ☐ Display all bids ☐ Display bid scores ☐ Display bid's total bid price ☐ Display factors

Award Details First 1 of 3 Last

Bidder Name: Jason Harvey **Bidder Type:** Vendor **Buyer:** CAROLINE HUDGINS

Award Type: Purchase Order **Award Currency:** Event USD **Terms:**

PO Business Unit: 50100

Award Number: 1 **Total Award:** 31,565.0000

Award Lines Customize | Find | View All | First 1-3 of 3 Last

| Line | Item ID | Vndr/Item Rel | Item Description | Group ID | UOM | Award Quantity | Awarded Price | Extended Price | | |
|------|------------|-------------------------------------|--------------------------------------|----------|-----|----------------|---------------|----------------|--|--|
| 6 | 7503532575 | <input checked="" type="checkbox"/> | STONE 8 P MIN. GRADE B | | LTN | 500.0000 | 21.3000 | 10,650.0000 | | |
| 9 | 7503548440 | <input checked="" type="checkbox"/> | STONE, CRUSHED GRADE 9 CRUSHED STONE | | LTN | 500.0000 | 18.3800 | 9,190.0000 | | |
| 10 | 7503548440 | <input checked="" type="checkbox"/> | STONE, CRUSHED GRADE 9 CRUSHED STONE | | LTN | 500.0000 | 23.4500 | 11,725.0000 | | |

Post Award



Award and Post the Event – By Group (Lot)

If Lines are grouped on the event (Lot), they must be bid on and awarded by Lot. Awards by group / lot are done on the **Analyze Group** page.

Navigate to this page using the following path :

**Main Menu > Sourcing > Maintain Events
Analyze Events**

- Search and select the event. The **Analyze Total** page will display.
- Click on the **Analyze Group** hyperlink.
- Click on the **Analyze** hyperlink next to each **Group ID / Lot** you wish to award. Another **Analyze Group** page will display and details the extended bid response.

CARDINAL

Home | New Window

Favorites | Main Menu > Sourcing > Maintain Events > Analyze Events

Analyze Group

[Analyze Total](#) | [Analyze Line](#) | Analyze Group

Business Unit: 50100 | Event ID: 0000150405 | Round: 1 | Version: 1 | Event Name: SET ASIDE: Interstate Mowing & Litter Removal

Event Format: Buy | Event Type: RFx | Currency: USD | End Date: 07/25/2012 10:00AM EDT | Status: Awarded | Go To: ...

| Line | Group ID | Description | Details | UOM | Start Price | Requested Qty | Qty Awarded | Line Status | Analyze |
|------|----------|-------------|-------------------------|-----|-------------|---------------|-------------|-------------|-------------------------|
| 1 | LOT 1 | Zone 1 | Details | 10 | 841.00000 | 1.0000 | 0.0000 | Open | Analyze |
| 1 | LOT 2 | Zone 2 | Details | 10 | 841.00000 | 1.0000 | 0.0000 | Open | Analyze |
| 2 | LOT 3 | Zone 3 | Details | 10 | 48.00000 | 1.0000 | 0.0000 | Open | Analyze |


[Save](#) | [Return to Search](#) | [Previous in List](#) | [Next in List](#)

[Analyze Total](#) | [Analyze Line](#) | [Analyze Group](#)



Award and Post the Event – By Grand Total

Bids are considered and awarded based on the sum of all line items (grand total). Cardinal retains all bid / proposal responses, including those that do not result in an award.

Home | Worklist

Favorites | Main Menu > Sourcing > Maintain Events > Analyze Events

New Window ? Help

Analyze Total

Analyze Total [Analyze Line](#)

Business Unit: 50100 **Event ID:** 0000150411 **Round:** 1 **Version:** 2 **Event Name:** Emergency Repair - Midtown Tunnel

Event Format: Buy **Event Type:** RFx **Currency:** USD **End Date:** 06/29/2012 4:30PM EDT **Status:** Awarded **Go To:**

Bid Analysis and Display Options

Analysis

| Bidder Name | ELECTRIC MOTOR REPAIR & SALES CO | ELECTRIC MOTOR & CONTRACTING CO INC |
|-----------------------------|--|---|
| Event Version Responded To: | 1 | 2 |
| Bid Number: | 1 | 1 |
| Total Bid Amount: | 8,000.0000 | 8,000.0000 |
| Total Bid Cost: | 8,000.00 | 0.00 |
| Total Event Score: | 0.0000 | 0.0000 |
| Total Header Cost: | 0.00 | 0.00 |
| Total Header Score: | 0.0000 | 0.0000 |

Bid Action

Reject Reason:

Award by Percent:

Hide Bid ☐

Analyze Total | [Analyze Line](#)



Award and Post the Event – Post the Award

Once the award determination has been made, use the **Award Details** page to award the event.

You can access the **Award Details** page from the **Analyze Total** or **Analyze Line** page using the drop-down **Go To:** menu and selecting **Award Events**.

You can also navigate to the **Award Details** page using the following path:

Main Menu > Sourcing > Maintain Events > Award Events

Analyze Total

Analyze Total

[Analyze Line](#)

Business Unit:50100

Event ID:0000150715

Round:1

Version:1

Event Name:Delivered Stone for Rockingham County

Event Format:Buy

Event Type:RFx

Currency:USD

End Date:12/19/2012 3:00PM EST

Status:Pending Award

Go To:

Award Events

▼ Bid Analysis and Display Options

Header Weighting:100.00000

Sort Bids By:Total Event Score

Sort Order:Descending

Analyze

Display Options

View Factor Responses

☐ Display Delta Responses

☐ Display Disqualified Bids

☒ Display Withdrawn

View Bid Actions

☒ All Bid Actions

☐ Award

☐ Counter

☐ Disallow

☐ Reject

☐ <No Action>

Analysis



Award and Post the Event – Post the Award (continued)

From the **Award Details** page, perform the following:

- Select the **Award Type** of **Purchase Order** or **PO Contract**.
- Ensure the **Vndr/Item Rel** checkbox is checked. This will associate the item with the vendor for future use.
- Click **Post Award**.

eVA and agency procurement standards / requirements will apply.

Award Details

Award Details

Business Unit:

50100

Event ID:

0000150662

Event Format:

Buy

Award Summary

Round:

1

Event Type:

RFX

Review Constraints

Version:

1

Currency:

USD

Event Name:

Brush Chipper, Trailer Mounted

End Date:

01/07/2013 12:00PM EST

Status:

Pending Award

Go To:

...

Show Award Details to Bidders

☐ Display bids

☐ Display all bids

☐ Display bid scores

☐ Display bid's total bid price

☐ Display factors

Award Details

Bidder Name:

Altec Industries Inc

Award Type:

Purchase Order

Bidder Type:

Vendor

Award Currency:

Event

PO Business Unit:

50100

Vendor

MIKE.HALL

Buyer:

30

Terms:

Award Number:

1

Total Award:

196,800.0000

Award Lines

Line

Item ID

Vndr/Item Rel

Item Description

Group ID

UOM

Award Quantity

Awarded Price

Extended Price

1

0200401000

☒

BRUSH AND TREE CHIPPERS BRUSH AND TREE CHIPPERS

EA

8.0000

24,600.0000

196,800.0000

Post Award



Create a Purchase Order / Contract – Award to Purchase Order

If the event is for a one time or spot purchase, the event is generally awarded to a PO. The **PO Business Unit**, **Line(s)**, and schedule information usually default from the sourcing event. Confirm accuracy of the information.

Select the **Award Type** value of **Purchase Order**.

For additional detail, see the course titled **501 PR344: Processing Purchase Orders**.

Award Details

Award Details

Business Unit:

50100

Event ID:

0000150757

Event Format:

Buy

Event Type:

RFx

Round:

1

Version:

2

Currency:

USD

End Date:

01/10/2013 2:40PM EST

Event Name:

FOB Stone for Wise Residency

Status:

Pending Award

Go To:

...

Show Award Details to Bidders

☐ Display bids

☐ Display all bids

☐ Display bid scores

☐ Display bid's total bid price

☐ Display factors

Award Details

Bidder Name:

Jessee Stone Co

Award Type:

Purchase Order

Bidder Type:

Vendor

Award Currency:

Event

USD

Buyer:

MIKE.HALL

Terms:

30

PO Business Unit:

50100

Award Number:

1

Total Award:

253,970.0000

Award Lines

Customize | Find | View All | First 1-10 of 12 Last

| Line | Item ID | Vndr/Item Rel | Item Description | Group ID | UOM | Award Quantity | Awarded Price | Extended Price | | |
|------|------------|-------------------------------------|-------------------------|----------|-----|----------------|---------------|----------------|--|--|
| 1 | 7503548480 | <input checked="" type="checkbox"/> | STONE, CRUSHED GRADE 25 | | LTN | 10,000.0000 | 9.4000 | 94,000.0000 | | |
| 2 | 7503532045 | <input checked="" type="checkbox"/> | STONE NO. 8, STONE | | LTN | 2,500.0000 | 8.4000 | 21,000.0000 | | |
| 3 | 7503532020 | <input checked="" type="checkbox"/> | STONE NO. 1, STONE | | LTN | 3,500.0000 | 9.4000 | 32,900.0000 | | |



Create a Purchase Order / Contract – Award to Purchase Order (continued)

Home | Wo

Favorites | Main Menu > Sourcing > Maintain Events > Award Events

New Window ? H

Award Details

[Award Details](#) | [Award Summary](#) | [Review Constraints](#)

Business Unit: 50100

Event ID: 0000150757

Event Format: Buy

Round: 1

Event Type: RFx

Currency: USD

Version: 2

End Date: 01/10/2013 2:40PM EST

Event Name: FOB Stone for Wise Residency

Status: Pending Award

Go To:

Show Award Details to Bidders

☐ Display bids | ☐ Display all bids | ☐ Display bid scores | ☐ Display bid's total bid price | ☐ Display factors

Award Details

First 1 of 1 Last

Bidder Name: [Jessee Stone Co](#)

Bidder Type: Vendor

Buyer:

Award Type:

Award Currency:

Terms:

PO Business Unit:

Award Number: 1

Total Award: 253,970.0000

Award Lines

Customize | Find | View All | First 1-10 of 12 Last

| Line | Item ID | Vndr/Item Rel | Item Description | Group ID | UOM | Award Quantity | Awarded Price | Extended Price | | |
|------|------------|-------------------------------------|--|----------|-----|----------------|---------------|----------------|--|--|
| 1 | 7503548480 | <input checked="" type="checkbox"/> | STONE, CRUSHED GRADE 25 | | LTN | 10,000.0000 | 9.4000 | 94,000.0000 | | |
| 2 | 7503532045 | <input checked="" type="checkbox"/> | STONE NO. 8. STONE | | LTN | 2,500.0000 | 8.4000 | 21,000.0000 | | |
| 3 | 7503532020 | <input checked="" type="checkbox"/> | STONE NO. 1. STONE | | LTN | 3,500.0000 | 9.4000 | 32,900.0000 | | |
| 4 | 7503548440 | <input checked="" type="checkbox"/> | STONE, CRUSHED GRADE 9 CRUSHED STONE | | LTN | 1,000.0000 | 9.9000 | 9,900.0000 | | |



Create a Purchase Order / Contract – Award to Purchase Order (continued)

Once you select **Purchase Order** as the **Award Type** and click **Post Award**, the **Express Purchase Order** page displays.

The **Express Purchase Order** page is similar to the regular **Purchase Order** page. When reviewing the page, take note of these items in particular:

- The **PO Status** of the PO is **Open** upon award and will change to **Approved** when the check mark is clicked.
- Use the **PO Defaults** hyperlink to modify or add the accounting distributions.
- Additional hyperlinks are also available and provide more details.
- You can review the schedule details for a line by clicking the arrow to the left of the line.

Once updated, the PO is complete and dispatched by the Buyer.

Express Purchase Order
Purchase Order

Business Unit: 50100
PO ID: 0001056476

Copy From: [Dropdown]

PO Status: Open [Checkmark] [X]
Budget Status: Not Chkd [Checkmark] [X]
☐ Hold From Further Processing

Header
*PO Date: 01/22/2013 [Vendor Search]
Vendor: FALLING-001 [Vendor Details]
*Vendor ID: 0000064755 [FALLING SPRINGS, LLC]
*Buyer: MIKE HALL [Hall, Mike (VDOT)]
PO Reference: [Text Box]
Web IMS?: ☐

Header Details
PO Defaults
Requisitions
PO Activities

Activity Summary
Document Status
Add Comments
Add Ship To Comments

Receipt Status: Not Recvd
*Dispatch Method: [Print] [Dispatch]
eVA PO Type: R01 [Routine Bill Vendor]
eVA Order Method: PRINT
eVA Interfaced: NSEV
eVA Dttm: [Text Box]

Amount Summary
Merchandise: 864,679.09
Freight/Tax/Misc.: 0.00 [Calculate]
Total Amount: 864,679.09 USD

Add Items From: Purchasing Kit Catalog Item Search
Select Lines To Display: Line: [Text Box] To: [Text Box] Retrieve

| Line | Item | Description | PO Qty | *UOM | Category | Merchandise Amt | Status |
|------|------------|----------------------|-----------|------|----------|-----------------|--------|
| 1 | 9269601000 | WETLAND DELINEATIONS | 1253.0000 | EA | 9269601 | 529,780.93 | Open |
| 2 | 9269601000 | WETLAND DELINEATIONS | 5.0000 | EA | 9269601 | 334,898.16 | Open |

Expand All Collapse All View Approvals
Go to: [More ...]

Save Return to Search Notify Refresh



Create a Purchase Order / Contract – Award to Purchase Order (continued)

Home | Worklist

Favorites | Main Menu > Sourcing > Maintain Events > Award Events

New Window ? Help

Express Purchase Order

Purchase Order

Business Unit: 50100
PO ID: 0001056476

PO Status: Open ☒
Budget Status: Not Chk'd ☐ ☐ ☐ ☐

Copy From:

☐ Hold From Further Processing

▼ Header

*PO Date: 01/22/2013 [Vendor Search](#)
Vendor: FALLING-001 [Vendor Details](#)
*Vendor ID: 0000064755 [FALLING SPRINGS, LLC](#)
*Buyer: MIKE.HALL [Hall, Mike \(VDOT\)](#)
PO Reference:
Web IMS?: ☐

[Header Details](#)
[PO Defaults](#)
[Requisitions](#)
[PO Activities](#)
[Activity Summary](#)
[Document Status](#)
[Add Comments](#)
[Add ShipTo Comments](#)

Receipt Status: Not Recvd

*Dispatch Method: Print
eVA PO Type: R01 [Routine Bill Vendor](#)
eVA Order Method: PRNT [NSEV](#)
eVA Interfaced:
eVA Dttm:

Amount Summary

Merchandise: 864,679.09
Freight/Tax/Misc.: 0.00
Total Amount: 864,679.09 USD

Add Items From

Purchasing Kit Catalog Item Search

Select Lines To Display
Line: To:

Lines

| Line | Item | Description | PO Qty | *UOM | Category | Merchandise Amt | Status |
|------|------------|----------------------|-----------|------|----------|-----------------|--------|
| 1 | 9269601000 | WETLAND DELINEATIONS | 1253.0000 | EA | 9269601 | 529,780.93 | Open |
| 2 | 9269601000 | WETLAND DELINEATIONS | 5.0000 | EA | 9269601 | 334,898.16 | Open |

Expand All Collapse All View Approvals

Go to:



Create a Purchase Order / Contract – Award to Contract

When an event is to be awarded to a contract, select the **Award Type** value of **PO Contract**. This selection opens up the fields on the **Contracts** screen. The Buyer enters the appropriate information (start and end dates, contract category, responsible organization code, etc.) into the contract. The contract is not available for use until this information has been entered and set to **Approved**.

For more details, please see the course titled **501 PR348: Entering Procurement Contracts**.

CARDINAL

Home | Worklist

Favorites | Main Menu > Sourcing > Maintain Events > Award Events

New Window ? Help

Award Details

[Award Summary](#) [Review Constraints](#)

Award Details

Business Unit: 50100 Event ID: 0000150757 Round: 1 Version: 2 Event Name: FOB Stone for Wise Residency

Event Format: Buy Event Type: RFX Currency: USD End Date: 01/10/2013 2:40PM EST Status: Pending Award Go To: ...

Show Award Details to Bidders

☐ Display bids ☐ Display all bids ☐ Display bid scores ☐ Display bid's total bid price ☐ Display factors

Award Details First 1 of 1 Last

Bidder Name: Jessee Stone Co. Bidder Type: Vendor Vendor: Event USD Buyer: MIKE.HALL

Award Type: PO Contract Award Currency: USD Terms: 30

PO Business Unit: 50100

Award Number: 1 Total Award: 253,970.0000

| Line | Item ID | Vndr/Item Rel | Item Description | Group ID | UOM | Award Quantity | Awarded Price | Extended Price | | |
|------|------------|---------------|--------------------------------------|----------|-----|----------------|---------------|----------------|--|--|
| 1 | 7503548480 | ✓ | STONE, CRUSHED GRADE 25 | | LTN | 10,000.0000 | 9.4000 | 94,000.0000 | | |
| 2 | 7503532045 | ✓ | STONE NO. 8, STONE | | LTN | 2,500.0000 | 8.4000 | 21,000.0000 | | |
| 3 | 7503532020 | ✓ | STONE NO. 1, STONE | | LTN | 3,500.0000 | 9.4000 | 32,900.0000 | | |
| 4 | 7503548440 | ✓ | STONE, CRUSHED GRADE 9 CRUSHED STONE | | LTN | 1,000.0000 | 9.9000 | 9,900.0000 | | |
| 5 | 7503532225 | ✓ | STONE NO. 68, STONE | | LTN | 250.0000 | 9.8000 | 2,450.0000 | | |



Create a Purchase Order / Contract – Award to Contract (continued)

Home | Worklist

Favorites | Main Menu > Sourcing > Maintain Events > Award Events

New Window ? Help

Award Details

Award Details

[Award Summary](#)

[Review Constraints](#)

Business Unit:
50100

Event ID:
0000150757

Round:
1

Version:
2

Event Name:
FOB Stone for Wise Residency

Event Format:
Buy

Event Type:
RFx

Currency:
USD

End Date:
01/10/2013 2:40PM EST

Status:
Pending Award

Go To:
...

Show Award Details to Bidders

☐ Display bids

☐ Display all bids

☐ Display bid scores

☐ Display bid's total bid price

☐ Display factors

Award Details

First 1 of 1 Last

Bidder Name:
Lessee Stone Co

Bidder Type:
Award Type:
PO Contract

Award Currency:
Event

Vendor:
Event

Buyer:
MIKE.HALL

Terms:
30

PO Business Unit:
50100

Award Number:
1

Total Award:
253,970.0000

Award Lines

Customize | Find | View All | First 1-10 of 12 Last

| Line | Item ID | Vndr/Item Rel | Item Description | Group ID | UOM | Award Quantity | Awarded Price | Extended Price | | |
|------|------------|---------------|--------------------------------------|----------|-----|----------------|---------------|----------------|--|--|
| 1 | 7503548480 | ✓ | STONE, CRUSHED GRADE 25 | | LTN | 10,000.0000 | 9.4000 | 94,000.0000 | | |
| 2 | 7503532045 | ✓ | STONE NO. 8, STONE | | LTN | 2,500.0000 | 8.4000 | 21,000.0000 | | |
| 3 | 7503532020 | ✓ | STONE NO. 1, STONE | | LTN | 3,500.0000 | 9.4000 | 32,900.0000 | | |
| 4 | 7503548440 | ✓ | STONE, CRUSHED GRADE 9 CRUSHED STONE | | LTN | 1,000.0000 | 9.9000 | 9,900.0000 | | |
| 5 | 7503532225 | ✓ | STONE NO. 68, STONE | | LTN | 250.0000 | 9.8000 | 2,450.0000 | | |



Cancel a Purchase Order / Contract Associated to an Event

Once you have awarded an event to a PO or a contract, Cardinal retains links to the PO and contract.

If the PO or contract are attached to an event, a cancellation will trigger Cardinal to ask whether you want to move a quantity back into the Strategic Sourcing award. This happens when:

- The PO or contract is cancelled
- A PO or contract line is cancelled
- A PO schedule is cancelled
- Quantities associated with a line or schedule are reduced

If you respond yes, Cardinal puts the quantity back to the award, and you can either re-award the quantity to another Bidder / Offeror or manually close it on the **Award Summary** page by setting the **Line Status** field to **Closed**.



Lesson 5: Summary

In this lesson, you learned:

- The **Analyze Total** page on the **Event Workbench** allows you to review bid / proposal responses.
- You have the option to invite others to collaborate on the bid / proposal responses.
- You can award by line, group, or grand total.
- After you have analyzed the bids / proposals responses and made your selection, you can award the winning bid / proposal to a PO or PO Contract.



Simulation: Analyze Bids / Proposals and Awarding Events

You are now about to view a simulation entitled **Analyzing Bids / Proposals and Awarding Events**. Click the Cardinal logo below to start the simulation.





Lesson 6: Strategic Sourcing Reports

This lesson covers the following topic:

- Reports



Reports

Key Strategic Sourcing reports include:

- Event Details Report
- Event Bid Tab Report



Event Details Report

Before posting the event, from the **Event Summary** page the **Preview PDF** button is used to generate an email attachment, which is sent to the Buyer. You can print and/or save the PDF for manual posting to eVA following normal procedures.

Favorites

Main Menu > Sourcing > Create Events > Event Details

Step 1: Define Event Basics

Enter basic information, general settings and optional rules for this event.

[* Event Settings and Options](#)

[Event Comments and Attachments](#)

[Event Header Bid Factors](#)

[Payment Terms and Contact Info](#)

[Event Constraints](#)

Step 2: Configure Line Items

Create line listings for this event.

[* Line Items](#)

[Item Line Defaults](#)

Step 3: Select Bidders to Invite

Send out targeted invitations to this event, designate it as a public event, or both.

[* Bidder Invitations](#)

Step 4: Invite Collaborators

Invite others to collaborate on this event. You may not post your event while collaborators are reviewing it.

[Event Collaborators](#)

Step 5: Post Event

When all event creation activities are complete, click Post Event to release your event for scheduled external viewing and trigger any bidder invitations you may have defined.

Save Event

Post

Save As Template

Preview PDF

106



Event Details Report (continued)

Once the event is posted, the **Preview PDF** button is no longer available on the **Event Summary** page. However, you can access the **Event Details Report** from the **Event Comments and Attachments** link.

You can navigate to this report using the following path:

Main Menu > Sourcing > Create Events > Event Details

Search for and select your event. From the **Event Summary** page, click on the **Event Comments and Attachments** hyperlink. Click the **View** button under the **Attachments** section.

FavoritesMain Menu > Sourcing > Create Events > Event Details

Modify an Event

Event Header Comments and Attachments

Event ID: JT_123

Enter CommentsView AllFirst1 of 1Last

Comments:

☐ Send To Bidder☐ Include On Award

Add Attachment

Attachments

| Attachment File | Attachment Description | Display to Bidder | Include On Award | Include in Notifications |
|-----------------|------------------------|-------------------------------------|--------------------------|-------------------------------------|
| AWARDETEST.pdf | Event Details | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |

View

OKCancelRefresh

Event Details

Commonwealth of Virginia
Department of Transportation

| Event ID | Format | Type | Page |
|---------------------------------|-----------|-------------------------|------|
| 50100-0000150219 | Buy | IFB Sealed Contract | 1 |
| Event Round | Version | | |
| 1 | 1 | | |
| Event Name | | | |
| MJH TEST001 | | | |
| Start Date/Time | | Close Date/Time | |
| 10/17/2011 16:58:00 EDT | | 10/18/2011 15:58:00 EDT | |
| Event Currency: | US Dollar | | |
| Bids allowed in other currency: | No | | |

Bidder: General Public

Submit To: VA Dept of Transportation
VDOT Central Office
1201 E Broad St
Richmond VA 23219
United States
Super User PR

Contact:
Phone:
Email:

Event Description

I. PURPOSE:

The Virginia Department of Transportation (herein referred to as "VDOT") is soliciting bids from interested firms to provide

PERIOD OF CONTRACT: From through (renewable)

The IFB must state either "from date of award," or specified date to a specified ending date, or delivery of goods or services.

If it will be a renewable term contract, put the word "renewable" in parenthesis after the "through" date if the contract contains a renewal clause. This will let potential bidders know right away if you anticipate the contract to go beyond the initial period. This is also restated under the Special Terms and Conditions under the Term of Contract clause.

See the example IFB provided.

II. QUESTIONS REGARDING THIS INVITATION FOR BID:

Any questions regarding this invitation for bid shall be addressed to Mr./Ms. Contract Officers Name at (804) 000-0000. The issuing office shall determine whether any addendum should be issued as a result of any questions or other matters raised.



Event Details Report (continued)

Event Details

Commonwealth of Virginia Department of Transportation

| Event ID | Format | Type | Page |
|-------------------------|-------------------------|---------------------|------|
| 50100-0000150219 | Buy | IFB Sealed Contract | 1 |
| Event Round | Version | | |
| 1 | 1 | | |
| Event Name | | | |
| MJH TEST001 | | | |
| Start Date/Time | Close Date/Time | | |
| 10/17/2011 16:58:00 EDT | 10/18/2011 15:58:00 EDT | | |

Event Currency: US Dollar
Bids allowed in other currency: No

Bidder: General Public

Submit To: VA Dept of Transportation
VDOT Central Office
1201 E Broad St
Richmond VA 23219
United States
Super User PR

Contact:
Phone:
Email:

Event Description

I. PURPOSE:

The Virginia Department of Transportation (herein referred to as "VDOT") is soliciting bids from interested firms to provide

PERIOD OF CONTRACT: From _____ through _____(renewable)

The IFB must state either "from date of award," or specified date to a specified ending date, or delivery of goods or services.
If it will be a renewable term contract, put the word "renewable" in parenthesis after the "through" date if the contract contains a renewal clause. This will let potential bidders know right away if you anticipate the contract to go beyond the initial period. This is also restated under the Special Terms and Conditions under the Term of Contract clause.
See the example IFB provided.

II. QUESTIONS REGARDING THIS INVITATION FOR BID:

Any questions regarding this invitation for bid shall be addressed to Mr./Ms. Contract Officers Name at (804) 000-0000. The issuing office shall determine whether any addendum should be issued as a result of any questions or other matters raised.



Event Bid Tab Report

The **Event Bid Tabulation Report (VRPR008)** provides a record of the tabulation of all bid responses. This report becomes part of the Procurement file. Use this report to view all bids / proposals received and the winning Bidder / Offeror.

You can navigate to this report using the following path:

Main Menu > Sourcing > Reports > Event Bid Tab

Enter your **Business Unit** and **Event ID**. Run the report.

Commonwealth of Virginia
Department of Transportation
BID TABULATION REPORT

Run Date: 02/26/2013
Run Time: 2:20 PM

Report ID : VRPR008

Business Unit: 50100
Event ID: 0000150771
Buyer: MERCADO, REGIDOR

Closing Date: 2/13/2013
Closing Time: 12:00:00 AM

Page No. 1 of 1

| Vendor ID | | Vendor | SWAM Type | Group / Lines / Item | Item Description | Quantity | Unit Price | Price | |
|--------------|--|----------------------------|----------------|----------------------|--------------------------------|----------|------------|------------|---------|
| | | | | | | | | Extended | Awarded |
| Line Type: L | | | | | | | | | |
| 0000032750 | | J R Tharpe Trucking Co Inc | Small Business | | | | | | |
| | | | | 1-7503548485 | STONE, CRUSHED GRADE 26 | 3,200.00 | 100.00 | 320,000.00 | |
| | | | | 2-7503532060 | STONE NO. 8, NON-POLISHING, ST | 1,200.00 | 100.00 | 120,000.00 | |
| | | | | 3-7503551310 | STONE RIP RAP CLASS AI | 200.00 | 100.00 | 20,000.00 | |
| | | | | 4-7503532030 | STONE NO. 3, STONE | 100.00 | 100.00 | 10,000.00 | |
| | | | | 5-7503532205 | STONE NO. 57, STONE | 100.00 | 100.00 | 10,000.00 | |
| | | | | Total : | | | | 480,000.00 | |
| | | | | | | | | | |
| 0000035070 | | BMC Rock Inc | Small Business | | | | | | |
| | | | | 1-7503548485 | STONE, CRUSHED GRADE 26 | 3,200.00 | 200.00 | 640,000.00 | |
| | | | | 2-7503532060 | STONE NO. 8, NON-POLISHING, ST | 1,200.00 | 200.00 | 240,000.00 | |
| | | | | 3-7503551310 | STONE RIP RAP CLASS AI | 200.00 | 200.00 | 40,000.00 | |
| | | | | 4-7503532030 | STONE NO. 3, STONE | 100.00 | 200.00 | 20,000.00 | |
| | | | | 5-7503532205 | STONE NO. 57, STONE | 100.00 | 200.00 | 20,000.00 | |
| | | | | Total : | | | | 960,000.00 | |



Event Bid Tab Report (continued)



Report ID : VRPR008

Commonwealth of Virginia Department of Transportation BID TABULATION REPORT

Run Date: 02/26/2013

Run Time: 2:20 PM

Business Unit: 50100

Event ID: 0000150771

Buyer: MERCADO, REGIDOR

Closing Date: 2/13/2013

Closing Time: 12:00:00 AM

Page No. 1 of 1

| | | | | | | | Price | |
|--------------|----------------------------|----------------|----------------------|--------------------------------|----------|------------|------------|---------|
| Vendor ID | Vendor | SWAM Type | Group / Line# / Item | Item Description | Quantity | Unit Price | Extended | Awarded |
| Line Type: L | | | | | | | | |
| 0000032750 | J R Tharpe Trucking Co Inc | Small Business | | | | | | |
| | | | 1-7503548485 | STONE, CRUSHED GRADE 26 | 3,200.00 | 100.00 | 320,000.00 | |
| | | | 2-7503532060 | STONE NO. 8, NON-POLISHING, ST | 1,200.00 | 100.00 | 120,000.00 | |
| | | | 3-7503551310 | STONE RIP RAP CLASS AI | 200.00 | 100.00 | 20,000.00 | |
| | | | 4-7503532030 | STONE NO. 3, STONE | 100.00 | 100.00 | 10,000.00 | |
| | | | 5-7503532205 | STONE NO. 57, STONE | 100.00 | 100.00 | 10,000.00 | |
| | | | | | Total : | | 480,000.00 | |
| 0000035070 | BMC Rock Inc | Small Business | | | | | | |
| | | | 1-7503548485 | STONE, CRUSHED GRADE 26 | 3,200.00 | 200.00 | 640,000.00 | |
| | | | 2-7503532060 | STONE NO. 8, NON-POLISHING, ST | 1,200.00 | 200.00 | 240,000.00 | |
| | | | 3-7503551310 | STONE RIP RAP CLASS AI | 200.00 | 200.00 | 40,000.00 | |
| | | | 4-7503532030 | STONE NO. 3, STONE | 100.00 | 200.00 | 20,000.00 | |
| | | | 5-7503532205 | STONE NO. 57, STONE | 100.00 | 200.00 | 20,000.00 | |
| | | | | | Total : | | 960,000.00 | |



Lesson 6: Summary

In this lesson, you learned:

- There are reports that are useful to users who work with the Strategic Sourcing module, i.e. the **Event Details Report** and the **Event Bid Tab Report**.



Lesson 7: Strategic Sourcing Hands-On Practice

This lesson includes practice that will reinforce the lessons learned today. Your instructor will provide direction regarding specific activities that are part of this lesson. Please ask your instructor if you have any questions.





Course Summary

In this course, you learned how to:

- Recognize key strategic sourcing concepts
- Create, modify, and manage Strategic Sourcing events in Cardinal
- Enter and analyze bids / proposals
- Award events
- Use key Strategic Sourcing reports
- Understand how Strategic Sourcing integrates with other Cardinal modules and interfaces with external systems



Course Evaluation

Congratulations! You successfully completed the **501 PR345: Strategic Sourcing** course. Please use the evaluation link to assess this course.





Appendix

- Key Terms
- Diagrams and Screenshots
- Flowchart key



Key Terms

Award: An award is made to the winning Bidder / Offeror by a purchase order (PO) or a contract.

Bidder / Offeror: The Bidder / Offeror is anyone who submits a bid / proposal on an event.

Bidder / Offeror Response: A Bidder / Offeror Response is the response by a Bidder / Offeror to an event.

Bid Factor: A bid factor is a weighted question about the Bidder's / Offeror's products, services, or company and may require a response by the Bidder / Offeror. Header bid factors relate to the overall event, whereas line bid factors relate only to the specific line.

Bids / Proposals: Bids / proposals are submissions of an offer on an event.

Buy Event: A Buy Event is the purchase of goods and/or services associated with a request for a price quote or proposal.

Event Format: The event format is either Buy or Request For Information (RFI).

Event Types: An event type may be an Invitation For Bid (IFB), Request For Proposal (RFP), or Request For Information (RFI).



Key Terms (continued)

IFB: An Invitation For Bid (competitive bidding) event type is the method by which bids for a specified good or service are solicited from Bidders / Offerors.

RFP: A Request For Proposal (competitive negotiation) event type is the method by which proposals for a good or service are solicited from Bidders / Offerors.

RFx: RFx is a catch-all term for event types such as Invitation For Bid (IFB), Request For Proposal (RFP), or Two-Step Bid.

RFI: A Request for Information (RFI) is a sourcing event type by which information about a good or service is solicited from Bidders / Offerors. It is more of an open inquiry seeking broad data and understanding.

Solicitation Type: The Solicitation Type is the classification of an event, which defines the means of procurement. Values include Emergency, IFB Sealed, IFB Unsealed, Prof Services, Request for Response, Standard Contract, Small Purchase, Sole Source, Step Bidding, and Unsealed Contract.

Strategic Sourcing Event: A Strategic Event is the process of soliciting quotes, bids / proposals and/or offers to establish contracts and/or purchase orders.

Two-Step Bid: A Two-Step Bid (competitive bidding) event type is the method by which an existing supplier is asked to provide a bid for a continued good or service based on an existing contract.



Event Statuses (continued)

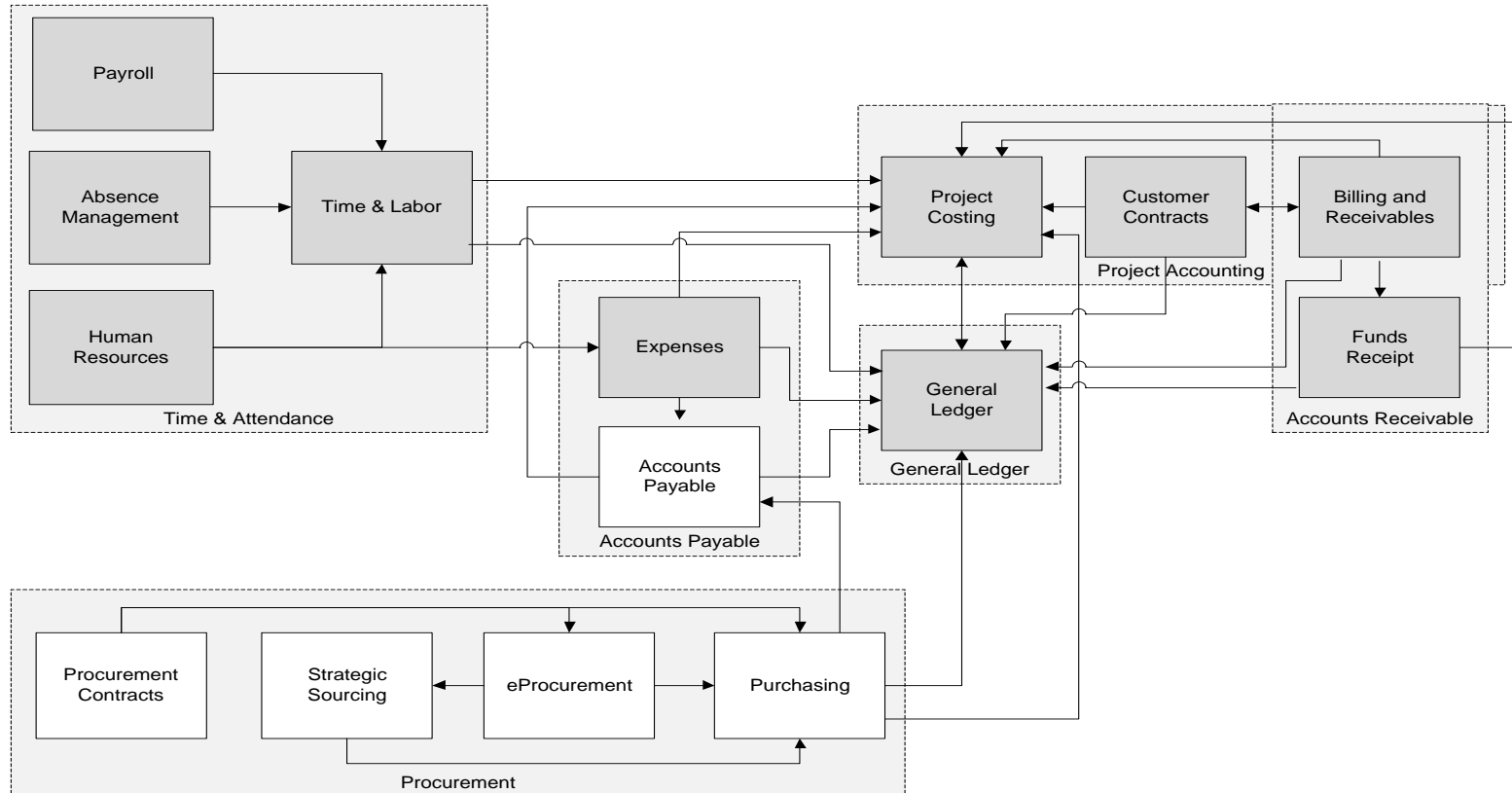
| Status | Description | Bids Allowed |
|----------------------------|--|--------------|
| Open | Saved event, not posted, not routed for collaboration | No |
| Posted | Event is ready for bidding | Yes |
| Collaborating Event | Event routed for internal collaboration | No |
| Event Complete | Event ended but update event status process has not run | Yes |
| Pending Award | Event is complete, update event status process has run, has not been awarded | No |
| Collaborating Bid Analysis | Event has routed for bid analysis collaboration | No |
| Awarded | Event award has been approved, event is complete | No |
| Not Awarded | Event ended without being awarded | No |
| Cancelled | Event was cancelled, no award | No |



Integration with Procurement and Accounts Payable

Strategic Sourcing integrates with other Cardinal modules in the following way:

- After an event is awarded, either a PO or contract is issued. These items integrate with future requisitions, POs, contracts, and PCards.

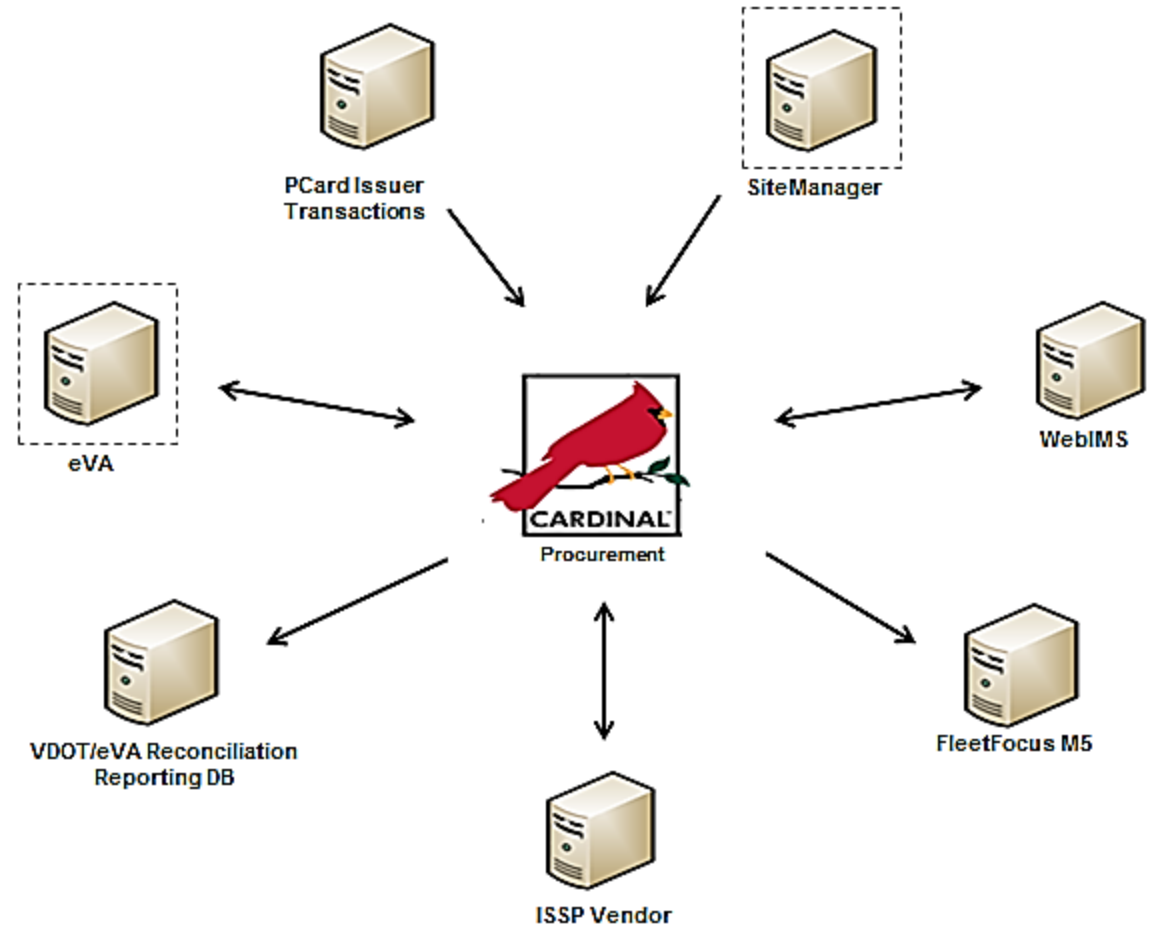




Interface with eVA











The Strategic Sourcing module also interfaces with an external system.

- Strategic Sourcing events are manually posted to eVA.
- All bidders must be registered in eVA.
- All eVA bidders (vendors) are interfaced into Cardinal for selection.





Flowchart Key

| Flowchart Key | | | |
|---|--|---|---|
|  | Depicts a process step or interface. |  | Indicates point at which the process begins. Does not represent any activity. |
|  | Specifies a batch process. |  | Indicates point at which the process ends. Does not represent any activity. |
|  | Depicts a process step that is performed manually. |  | Depicts a document of any kind, either electronic or had copy. |
|  | Defines the possible outcomes of a decision or analysis that took place in a step immediately preceding. |  | Indicates an On-Page or Intra Process Connector. Used to avoid complex overlapping connector lines or to continue a process on a subsequent page. |
|  | Represents an entittly (person, organization, etc.). |  | Connects steps between business processes. |